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United States
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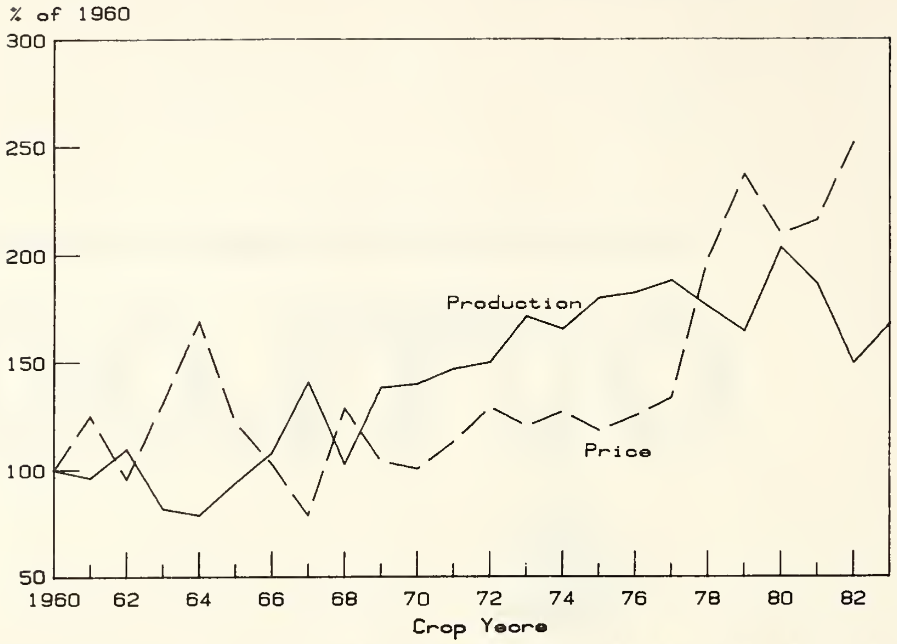
TFS-225

November 1982

Fruit

OUTLOOK & SITUATION

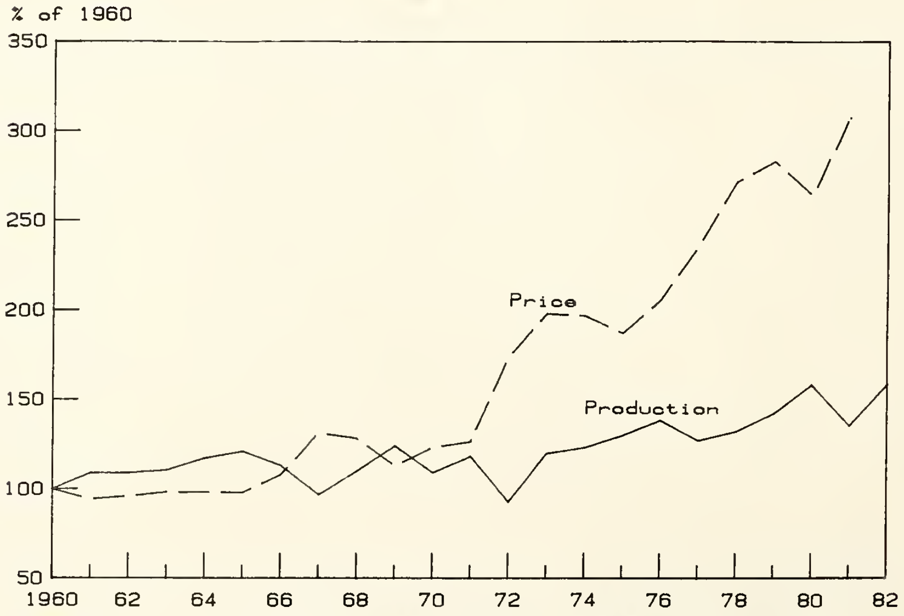
Citrus Fruit Production and Farm Prices



Production of all Citrus Fruits. Season average grower's price weighted by production. 1982 preliminary. 1983 indicated.

USDA Neg. ERS 2042-82 (10)

Noncitrus Fruit Production and Farm Prices



Production of 15 major fruits. Season average grower's price weighted by production. 1981 preliminary. 1982 includes 12 major fruit only.

USDA Neg. ERS 8485-82 (10)

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The *Fruit Situation* is puplished in March, July, September and November.

Approved by
The World Agricultural
Outlook Board
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Principal Contributors:
Ben W. Huang
Barbara J. Peacock
(202) 447-7290

Statistical Assistant:
Wynnice Napper

Electronic Word Processing:
Rhodia D. Ewell

National Economics Division
Economic Research Service
U.S. Department of Agriculture
Washington, D.C. 20250

Summary

U.S. Fruit Supplies Larger; Lower Prices Likely

Supplies of U.S. fresh fruit this winter are expected to be substantially larger than a year ago, mainly because of bigger apple and orange crops. In addition, stocks of grapes in cold storage are well above a year earlier. Even though the pack of most processed noncitrus fruit is smaller than last year, the large carryover will still result in adequate supplies for market needs. Supplies of processed citrus products will also be sufficient. Consequently, both farm and retail prices of fresh fruit are expected to decline from current high levels. The sluggish economy and ample supplies are likely to keep prices of processed fruit items relatively steady. If movement is slack, occasional promotional allowances to reduce canned fruit prices are likely.

October 1 prospects indicate a 1982/83 citrus crop of 13.6 million tons (including, for California grapefruit, only desert valley fruit). This is 13 percent more than last season but still 9 percent below 1980/81. A sharply larger orange crop is chiefly responsible. Larger crops are also estimated for lemons, limes, tangerines, and Temples, but smaller crops are indicated for grapefruit and tangelos. Total U.S. orange production is forecast at 216 million boxes, 21 percent more than last season. In Florida, output of all oranges is expected to be 143 million boxes, 14 percent above last year's freeze-damaged crop. The California crop is estimated at 63 million boxes, 47 percent more than last season. Arizona producers expect to harvest 3.3 million boxes, up 8 percent, and Texas output is forecast at 6.2 million boxes, up 4 percent.

Grower prices for fresh oranges advanced steadily from last April to September but then fell dramatically in October. Farm prices will continue to fall when supplies of California navels become available this winter, and retail prices will follow. The increased supplies of apples will also weaken orange prices.

Grapefruit prospects on October 1 (including, for California, only desert valley fruit) point to a crop of 64 million boxes, 6 percent less than last season and virtually the same as in 1980/81. Florida's forecast of 44 million boxes is 9 percent less than last season. Texas growers expect to harvest 13.5 million boxes, off 3 percent from last season's large output. Crops in Arizona and California are expected to be up by 8 and 14 percent, respectively. Even with a smaller crop, early season prices for Florida grapefruit have averaged substantially to sharply below last year. The large orange crop and the increased stocks of most processed grapefruit products are likely to continue exerting downward pressure on grapefruit prices. However, if the world economy turns around in 1983 and export markets improve, good demand might strengthen prices somewhat.

The Arizona-California lemon crop (tree crop available for harvest) is forecast at 28.5 million boxes, 15 percent more than the preceding harvest, but still 9 percent less than the record 1980/81 utilized production. Crop prospects are up 12 percent for California and 22 percent for Arizona. Even with a larger crop, shipments through mid-October were slightly behind last season's pace. F.o.b. prices have averaged moderately below a year ago and are expected to continue lower throughout this winter.

With a larger crop and a higher juice yield, the total pack of frozen concentrated orange juice (FCOJ) in 1982/83 is expected to exceed last season. Juice yield is forecast at 1.37 gallons a box at 42.0 degree brix equivalent, compared with 1.28 gallons a year ago. If imports continue heavy and sales do not strengthen, the relatively large supply may keep prices from rising.

The 1982 noncitrus crop, including major tree fruits, grapes, and cranberries, is forecast at 13.1 million tons, 9 percent above last year. Smaller production of the principal summer fruits was more than offset by the apple and grape crops, which are expected to be 9 and 27 percent larger, respectively. However, the winter pear crop is 13 percent smaller. Both farm and retail apple prices were considerably above a year ago, but they have declined with larger supplies. Market prospects for fresh apples through this winter point to farm and retail prices below a year earlier.

This season's pack of most principal canned noncitrus fruit will be lower than last year. But with ending stocks larger, supplies of canned fruit will be adequate, and sluggish movement may hold prices relatively steady. Reflecting larger crops of strawberries and tart cherries, supplies of frozen fruits and berries will be up, and prices may weaken. Raisin output, even with a sharply larger crop of raisin-type grapes, will be reduced from last year because of the late September storm in California. However, supplies will still be sufficient. Prices are likely to strengthen somewhat.

Output of almonds and walnuts will be moderately below last year's record crops. The pecan crop is expected to be sharply smaller than last year, while filberts will be considerably larger. However, with a large carryover of tree nuts, supplies will be ample. Demand is expected to remain relatively good, and grower prices are likely to strengthen. The USDA estimate of per capita tree nut consumption for 1981 has been changed from 1.67 pounds to 1.85, because the 1981 figure for pecan consumption was erroneously reported in the September 1982 Fruit Situation as 0.20 pound per person instead of 0.38.

Fruit Situation

GENERAL PRICE OUTLOOK

After six consecutive monthly increases, the index of prices received by growers for fresh and processing fruit declined to 196 (1977=100) in October, from a record high of 296 in September, but still 51 percent above a year ago. Sharply lower prices for California Valencia oranges accounted for most of the decrease. With larger supplies of apples and citrus, particularly oranges, the index is expected to continue to decline this winter from current high levels. Prices may fall below a year ago if there is no freeze in the citrus areas this winter.

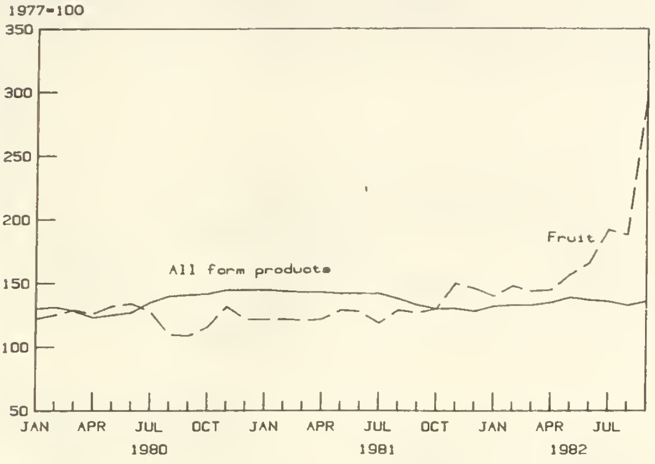
Except frozen juice, which averaged well below a year ago, wholesale prices of most processed fruit items have averaged near last year's level. The September wholesale price index for canned fruit as reported by the Bureau of Labor Statistics (BLS) was 245.4 (1967=100), only slightly above last year. With adequate supplies and the sluggish economy here and abroad, wholesale prices of canned fruit are not likely to advance appreciably. However, there will probably be occasional promotional reductions during 1982/83 if movement is slack. The larger Florida pack and heavy imports of FCOJ from Brazil may keep wholesale prices relatively steady. Sharply larger packs of frozen strawberries and tart cherries have been recorded this year. Even with a smaller carryover and reduced imports of frozen strawberries from Mexico, total supplies will still be adequate. Wholesale prices of both frozen cherries and strawberries may weaken.

With the recent storms in California, raisin production will be smaller than last year. However, the large carryover will still result in adequate supplies of raisins this season. Prune production will also be smaller, but the total supply will be adequate because of a substantially larger carryin. So, if movement remains sluggish, adequate supplies may keep prices of both raisins and prunes relatively steady.

Higher prices of apples and oranges have kept retail prices of fresh fruit substantially above a year earlier. The September retail price index reported by BLS was 329.0 (1967=100), 7.4 percent above a year ago. Since supplies of fresh fruit increase seasonally this fall, retail prices will likely decline. But the increased costs of marketing will hold retail prices moderately higher than a year ago.

Adequate supplies have moderated increases in retail prices of processed fruit. In September, the BLS index of retail prices for processed fruit was 149 (1977=100), only slightly advanced from August. The September index was 3.7 percent above a year earlier. With current economic conditions sluggish and supplies adequate, prices are likely to increase only slightly from current levels.

Price received by Producers, Fruit and All Farm Products



USDA Neg. ERS 2253-82 (10)

Table 1—Index of annual and quarterly prices received by growers for fresh and processed fruit

Year	1977=100				
	Annual	1st	2nd	3rd	4th
1980	124	125	131	116	123
1981	129	122	126	125	142
1982		144	156	225	

Source: *Agricultural Prices*, SRS.

Table 2—Annual and quarterly consumer price indexes for fresh fruit

Year	1967=100				
	Annual	1st	2nd	3rd	4th
1980	264	238	265	290	261
1981	278	256	276	302	279
1982		289	322	333	

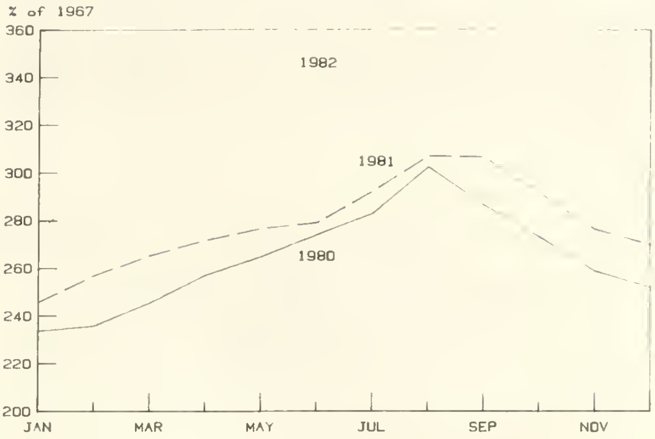
Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 3—Annual and quarterly wholesale price indexes for canned fruit

Year	1967=100				
	Annual	1st	2nd	3rd	4th
1980	232.4	227.2	231.4	233.3	237.5
1981	242.5	238.5	239.2	243.0	249.2
1982		254.0	252.7	249.6	

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Fresh Fruit: BLS Consumer Price Index



USDA Neg. ERS 0974-82 (10)

CITRUS

October 1 prospects for 1982/83, excluding California "other areas" grapefruit, indicate a citrus crop of 13.6 million tons, 13 percent more than last season but still 9 percent below 1980/81. A sharply larger orange crop is chiefly responsible. Larger crops are also estimated for lemons, limes, tangerines, and Temples, but smaller crops are indicated for grapefruit and tangelos.

Oranges

Crop Sharply Larger

October 1 prospects point to a crop of 216 million boxes, 21 percent more than last season but 12 percent below 1980/81. Larger crops are indicated for all producing areas.

The forecast for production of all oranges in Florida is 143 million boxes, 14 percent above last season's freeze-damaged crop but 17 percent less than 1980/81. Production of early and midseason varieties in Florida, 72 million boxes, is 3 percent less than last season. Valencia production in Florida is expected to total 71 million boxes, 37 percent more than last season's crop.

At 63 million boxes, the California crop is 47 percent more than last season but 3 percent below the 1980/81 season. The navel crop is placed at 37 million boxes, 37 percent above the 1981/82 crop but 5 percent below the record-high 1980/81 crop. The Valencia forecast for California is 26 million boxes, 63 percent greater than last season but 2 percent below 1980/81. Arizona producers expect to harvest 3.3 million boxes, 8 percent more than last season. All orange production in Texas is forecast at 6.2 million boxes, up 4 percent from last season.

Export Demand Weak; Imports Strong

The weak economy and higher U.S. orange prices have caused U.S. exports of fresh oranges to decline. During the 10 months ending August 1982, U.S. exports totaled 339,467 metric tons, down 9 percent from a year ago.

Canada, our leading customer, showed a substantial decline but still accounted for 38 percent of the total exports. The strong U.S. dollar also has severely hurt U.S. orange sales to European markets, with an 82-percent decline from last year. Shipments to all major importing countries fell drastically. However, Hong Kong, with a moderate decrease, remains our second largest customer. On the other hand, Japan has become our third largest market, as U.S. orange exports to Japan continued to increase with the enlargement of the import quota for U.S. oranges. Shipments to Japan have increased 14 percent over a year ago.

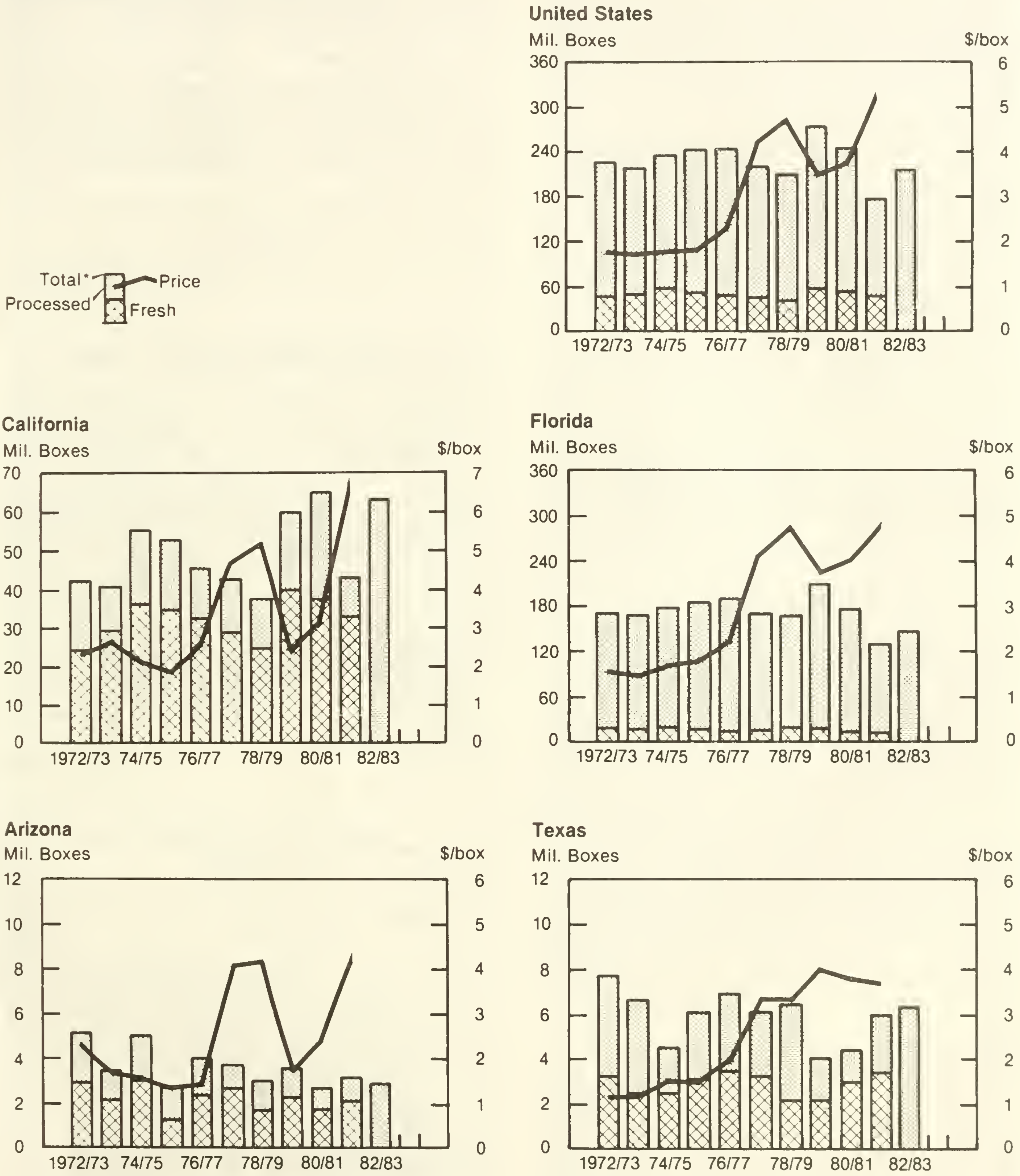
Table 4—Citrus fruit: Production, 1980/81, 1981/82, and indicated 1982/83[1]

Crop and State	Boxes			Ton equivalent		
	Utilized		Indicated	Utilized		Indicated
	1980/81	1981/82	1982/83	1980/81	1981/82	1982/83
	1,000 boxes[2]			*1,000 short tons*		
Oranges						
Early, midseason, and Navel varieties[3]						
California	38,750	27,000	37,000	1,453	1,013	1,388
Florida	105,600	74,000	72,000	4,752	3,330	3,240
Texas	2,600	3,610	3,800	110	153	162
Arizona	900	900	950	34	34	36
Total	147,850	105,510	113,750	6,349	4,530	4,826
Valencias						
California	26,500	16,000	26,000	994	600	975
Florida	66,800	51,800	71,000	3,006	2,331	3,195
Texas	1,730	2,330	2,400	74	99	102
Arizona	1,700	2,150	2,350	64	80	88
Total	96,730	72,280	101,750	4,138	3,110	4,360
All oranges						
California	65,250	43,000	63,000	2,447	1,613	2,363
Florida	172,400	125,800	143,000	7,758	5,661	6,435
Texas	4,330	5,940	6,200	184	252	264
Arizona	2,600	3,050	3,300	98	114	124
Total oranges	244,580	177,790	215,500	10,487	7,640	9,186
Grapefruit						
Florida all	50,300	48,100	44,000	2,138	2,044	1,870
Seedless	43,000	42,100	38,000	1,828	1,789	1,615
Pink	14,600	14,800	13,000	621	629	553
White	28,400	27,300	25,000	1,207	1,160	1,062
Other	7,300	6,000	6,000	310	255	255
Texas	6,700	13,900	13,500	268	556	540
Arizona	2,800	2,400	2,600	90	77	83
California	8,060	6,610	—	263	216	—
Desert Valley	4,260	3,410	3,900	136	109	125
Other areas	3,800	3,200	(4)	127	107	(4)
Total grapefruit	67,860	71,010	—	2,759	2,893	—
Lemons						
California	24,300	18,500	20,800	923	703	790
Arizona	7,000	6,300	7,700	266	239	293
Total lemons	31,300	24,800	28,500	1,189	942	1,083
Limes						
Florida	1,200	1,300	1,700	48	52	68
Tangelos						
Florida	4,900	5,100	4,200	221	230	189
Tangerines						
Florida	3,000	2,500	3,200	143	119	152
Arizona	700	750	700	26	28	26
California	1,860	1,730	2,000	70	65	75
Total tangerines	5,560	4,980	5,900	239	212	253
Temples						
Florida	3,600	3,200	4,600	162	144	207
Total	359,000	288,180	[5]324,400	15,105	12,113	13,604

[1] The crop year begins with bloom of the first year shown and ends with completion of harvest the following year. [2] Net content of box varies. Approximated averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas 85 lbs.; Grapefruit-California, Desert Valley and Arizona, 64 lbs.; other California areas, 67, lbs.; Florida, 85 lbs.; Texas, 80 lbs.; Lemons, 76 lbs.; Limes 80 lbs.; Tangelos, 90 lbs.; Tangerines-California and Arizona, 75 lbs.; and Temples 90 lbs. [3] Navel and miscellaneous varieties in California and Arizona. Early and midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. [4] The first forecast for California grapefruit other areas will be as of December 1, 1982. [5] Excludes California grapefruit in other areas."

Sources: *Crop Production*, SRS and Florida Crop and Livestock Reporting Service.

Oranges:
Production, Utilization and Prices



* Production having value. Prices-on-tree returns.
1982/83 data October 1, indication of total production. Crop years.

Sharply reduced supplies have resulted in dramatically larger imports of fresh oranges. During the first 8 months of 1982, imports totaled 18,864 metric tons, almost double from a year earlier. Mexico, our leading supplier, showed an increase of 158 percent from last year. Shipments from Israel more than doubled. These two countries accounted for 86 percent of the total imports.

Lower Prices Expected

Fresh orange prices at both farm and retail levels so far have been well above a year ago. U.S. prices to growers for fresh oranges averaged $13.57 a box (equivalent on-tree returns) in October, compared with $5.50 a year earlier. Retail prices of fresh oranges averaged 60.9 cents a pound in September, 46 percent above last year. However, prices of fresh oranges will continue to decline from the current high levels when sharply larger supplies of California navel oranges and increased supplies of apples become available.

U.S. grower prices for fresh and processing oranges during 1981/82 averaged $5.24 a box (equivalent on-tree returns), up 40 percent from the preceding season. The Florida freeze and reduced supplies of California oranges available for fresh market contributed to sharply higher prices, which were recorded for all producing areas except Texas. However, because of a smaller crop, the total value of orange production was estimated at $1.2 billion (equivalent packinghouse-door returns), down 5 percent from 1980/81.

Grapefruit

Supplies Moderately Smaller

October 1 prospects for 1982/83 grapefruit production (including, for California, only desert valley fruit) point to a crop of 64 million boxes, 6 percent less than last season and virtually the same as in 1980/81. Smaller crops in Florida and Texas more than offset larger crops from Arizona and California.

Florida's grapefruit forecast of 44 million boxes is 9 percent less than last season's crop. Florida fruit has developed well ahead of normal, due to an early bloom this spring and ideal growing conditions. Fruit size is large for this time of the year and fruit coloring has progressed well. Texas growers expect to harvest 13.5 million boxes, off 3 percent from last season's large crop. The crop in the California desert area is forecast at 3.9 million boxes, 14 percent above the 1981/82 crop. Arizona growers expect to harvest 2.6 million boxes, 8 percent more than last season.

Exports Weak

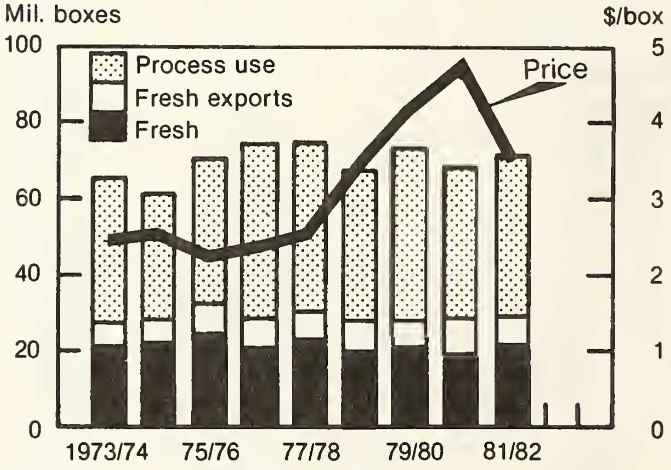
The weak economy abroad and the strong U.S. dollar have hurt our export sales of grapefruit. For the 1981/82 season, total exports amounted to 260,513 metric tons, off 12 percent from the previous season. Smaller exports were indicated for almost every country. Japan, our largest customer, showed a substantial decrease. Consequently, the Japanese share of U.S. export sales fell to 52 percent from 54 percent during 1980/81. Canada and most Western European countries also reduced their purchases of U.S. grapefruit. However, West Germany, Belgium-Luxembourg, and Finland bought more grapefruit than last season. Also, Hong Kong, although it imported a relatively small quantity of U.S. grapefruit, showed a strong gain. The export market is of vital importance to domestic growers.

Lower Prices Likely

Grapefruit prices received by growers for the 1981/82 season averaged sharply lower than the preceding season. The average U.S. price for all grapefruit, $2.25 a box (equivalent on-tree returns), was down 36 percent from 1980/81. Lower prices were recorded for both fresh and processing uses.

Because the Florida grapefruit crop is maturing earlier than normal this year, shipments from Florida through mid-October were well above last year's levels. Consequently, f.o.b. prices have averaged substantially to sharply below last year. Carryover stocks of most processed

U.S. Grapefruit Production, Use, and Prices

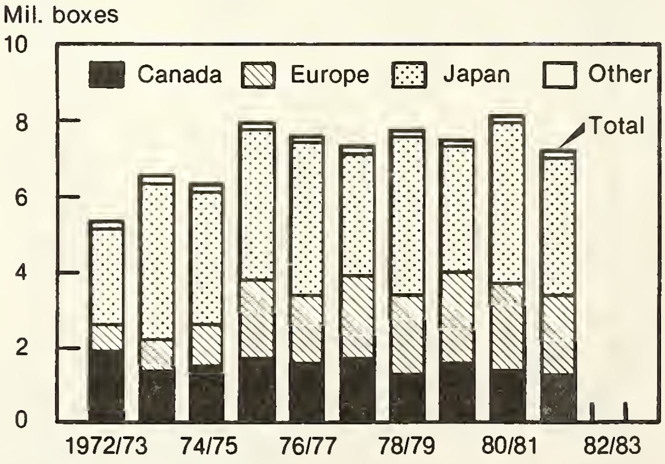


Price-season average packinghouse-door returns.
Year beginning September.

USDA

Neg. ERS 162-82(10)

U.S. Export of Fresh Grapefruit



Season beginning September.

USDA

Neg. ERS 852-82(10)

grapefruit products are up going into the 1982/83 season, so processor demand is not expected to be strong this season. Thus, even with a moderately smaller crop, the larger orange crop and relatively weak processor demand may keep grapefruit prices below last season. However, if export markets improve somewhat when the world economy turns around in 1983, good demand might strengthen prices somewhat.

Retail prices of fresh grapefruit have averaged 36.3 cents per pound for the first 8 months of 1982, down moderately from a year earlier. As supplies increase seasonally this fall and winter, prices will decline, and they are expected to remain below a year earlier through mid-winter.

Lemons

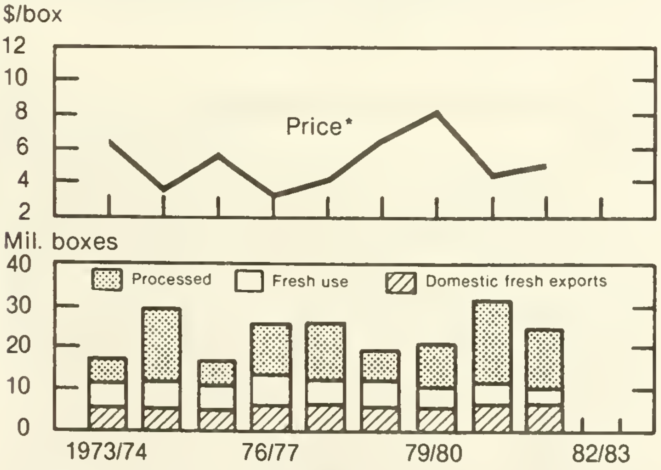
Crop Significantly Bigger

The Arizona-California lemon crop (tree crop available for harvest) is forecast at 28.5 million boxes, 15 percent more than the crop harvested during the 1981/82 season but 9 percent less than the record 1980/81 utilized production. California's crop, at 20.8 million boxes, is up 12 percent from last season but 14 percent below 1980/81. In Arizona, a crop of 7.7 million boxes is expected, 22 percent more than the 1981/82 crop harvested last season.

Even with a larger crop, total shipments through mid-October were slightly behind last season's pace, primarily reflecting the sharp decrease in export sales. Deliveries to the fresh market have been moderately larger, while processing use was down slightly from last year's level. In response to a larger crop, f.o.b. prices have averaged $10.81 a box, 4 percent below a year earlier.

The 1981/82 season-average price received by growers for all uses of lemons was $2.36 a box (equivalent on-tree returns), compared with $2.14 for 1980/81. In view of the sharply larger crop, lemon prices are expected to average below last year's high levels.

U.S. Lemon Production, Use, and Price



*Price-season average packinghouse-door returns.
Year beginning August.
USDA Neg. ERS 5822-82(10)

Other Citrus Fruit

Tangelo Crop Down

Output of Florida tangelos, excluding K-early citrus fruit, is expected to total 4.2 million boxes, 18 percent less than the 1981/82 crop. More of the tangelo crop usually goes to processing outlets than to fresh market. Opening f.o.b. prices this season were quoted at $10.00 a 4/5-bushel carton, compared with $8.25 last season. In view of a sharply smaller crop, prices this season will probably average moderately higher than last season. During 1981/82, processing use was up 17 percent from the preceding season, while shipments to fresh market outlets were down 13 percent. Consequently, processing use accounted for 65 percent of the crop, compared with 58 percent a year before. Because of a smaller quantity sold to fresh market, grower prices of tangelos for fresh market averaged $7.00 a box (equivalent packinghouse-door returns), up 7 percent from a year earlier. Larger supplies depressed prices for processing tangelos by 5 percent. As a result, the season-average price for all sales was $5.57 a box in 1981/82, compared with $5.70 a year earlier.

Tangerine Crop Shows Increase

The first forecast of the U.S. tangerine crop is 5.9 million boxes, 18 percent more than last season. Both California and Florida expect larger crops, while the Arizona crop will be smaller. The Florida forecast, at 3.2 million boxes, is for that portion of the crop expected to reach a size of 210 fruit per 4/5-bushel carton by December 1 for Dancy and November 1 for Robinson. California growers expect to harvest 2 million boxes, 16 percent above last season's production. Prospects for Arizona's tangerine crop, at 700,000 boxes, are down 7 percent from last year.

Tangerines are predominately a fresh market fruit. Even with a substantially smaller crop, the proportion of tangerines for fresh use went up from 55 percent in 1980/81 to 63 percent in 1981/82, primarily reflecting the sharply increased utilization of the California crop for fresh market.

In response to a smaller crop, the season-average price received by growers for all uses in 1981/82 was $5.53 a box (equivalent on-tree returns), 52 percent above the preceding season. Prices are expected to average moderately lower this season because of larger crops of both oranges and tangerines.

Many More Temples Expected

Prospects for the Florida Temples, at 4.6 million boxes, are up 44 percent from last season's freeze-damaged crop. Harvest is expected to begin by January.

Because of the freeze, the proportion of Temples used for processing went from 69 percent in 1980/81 to 74 percent in 1981/82. The season-average price for all uses was $4.20 a box, almost the same as a year earlier. Prices for fresh use were down slightly, while those for processing use were up moderately. Prices are expected to average substantially lower this season than last.

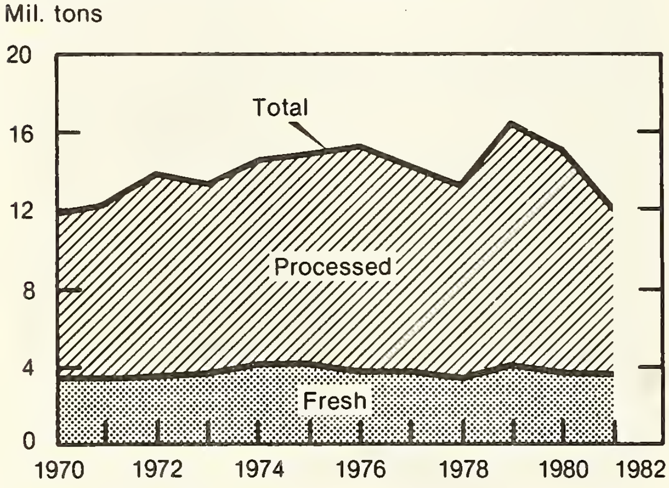
PROCESSED CITRUS

Processing Use Last Season Reduced

The sharply reduced orange output during 1981/82 had a greater impact on utilization of citrus for processing than for fresh sales. Processing use totaled 8.4 million tons, off 25 percent from 1980/81. The share for processing use was also down, going from 75 percent in 1980/81 to 70 percent in 1981/82. In contrast, the fresh sales of citrus were down only 4 percent.

Because of the dramatically reduced crop, the quantity of Florida oranges processed declined 28 percent from 1980/81, but the processed share was down only slightly. However, fresh sales of oranges were only down 8 percent from 1980/81. Likewise, the smaller grapefruit crop also resulted in moderate decreases in both fresh and processing uses, but their shares of the total crop remained near the previous season's levels.

Citrus Fruit Production and Utilization



Beginning crop year indicated.

USDA

Neg. ERS 0831-82(10)

Because of higher prices, a much larger percentage of California oranges was sold fresh. More than 80 percent of the navel oranges were sold for fresh market, compared with 57 percent in 1980/81. A sharply larger percentage of Valencia oranges also went for fresh uses—from 58 percent in 1980/81 to 78 percent in 1981/82. Preliminary estimates of California grapefruit used for both fresh and processing markets fell as a result of the sharply smaller crop. However, a larger share of the State's total crop was recorded for fresh sales. Lemons used for both fresh and processing markets also fell.

The larger crops pushed up fresh sales for both oranges and grapefruit in Texas, but their share decreased. For oranges, the quantity for fresh sales increased 16 percent from 1980/81, but the fresh share fell from 66 to 56 percent in 1981/82. For grapefruit, the quantity for fresh sales increased more pronouncedly, but the fresh share declined to 52 percent from 69 percent in 1980/81.

Carryover of FCOJ Smaller, But Larger FCGJ Expected

As a result of the Florida freeze, the quantity of oranges—including tangelos, Temples, tangerines, and K-early citrus—used for FCOJ in 1981/82 was sharply reduced. So, even with a lower degree brix equivalent—42.0 vs. 43.4—and higher juice yield, the Florida packers only processed 133.4 million gallons of FCOJ, down 23 percent from the previous season. The Florida FCOJ yield is estimated at 1.28 gallons per box at 42.0 degree brix equivalent, compared with the 1980/81 yield of 1.21 gallons per box at 43.4 degree brix equivalent. Even with the sharply larger carryin and heavy imports, the total supply of FCOJ is still below the level of 1980/81.

Because of the freeze, canners' list prices for FCOJ of unadvertised brands have fluctuated from a low of $3.95 per dozen 6-ounce cans to a high of $4.45. The current price is $3.95, compared with $4.25 a year earlier. Even with a lower price, movement has been running behind last year's pace. Nevertheless, the stocks on hand as of October 16 were 70.8 million gallons, 17 percent below a year ago. If the movement stays at the current pace, the carryover could approach 45-50 million gallons, compared with 69 million a year earlier.

With a larger crop and higher juice yield, the total pack of FCOJ in 1982/83 is expected to exceed last season's level. The forecast of the 1982/83 juice yield is

Table 5—Oranges and grapefruit processed, Florida 1979/80 through 1981/82

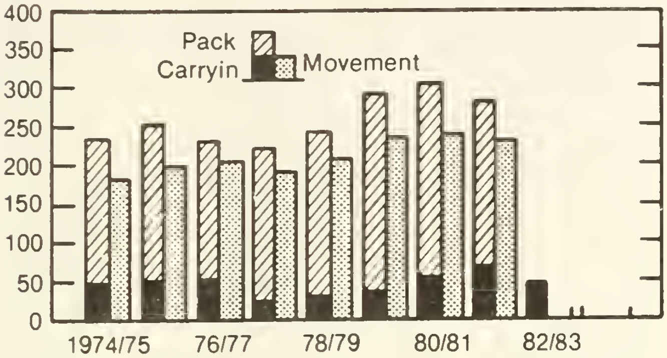
Crop and season	Frozen concentrates	Chilled products		Other processes[2]	Total processed
		Juice	Sections and salads		
		1,000 boxes			
Oranges[1]:					
1979/80	174,883	24,428	309	6,957	206,577
1980/81	144,309	19,640	227	6,353	171,529
1981/82	105,146	16,293	225	4,477	126,141
Grapefruit:					
1979/80	18,506	3,592	801	12,400	35,299
1980/81	19,490	2,844	645	10,154	33,133
1981/82	20,052	1,697	628	8,923	31,300

[1] Includes tangelos, Temples, tangerines, and K-early citrus. [2] Includes cannery juice, blend, sections, and salads.

Source: *Citrus Fruits*, SRS.

Florida Supply and Movement of Frozen Concentrate Orange Juice

Mil. gals.*

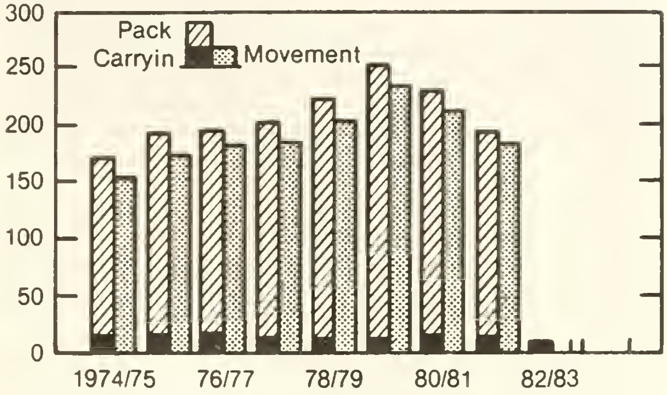


*From 1974/75 through 1979/80, 45° Brix, 1980/81, 43.4 Brix. Beginning 1981/82 Brix change to 42.0°. Pack includes imports. Year beginning December. 1981/82 pack and movement estimated. 1982/83 carryin estimated.

USDA Neg. ERS 5713-82(10)

Florida Supply and Movement of Chilled Orange Juice

Mil. gals.



Pack excludes single-strength reprocessed. Year beginning October. Florida Citrus Processors Association.

USDA Neg. ERS 2456-82(10)

1.37 gallons a box at 42.0 degree brix equivalent. However, even with a larger pack likely, the total supply of FCOJ may not be much larger than a year ago, unless imports continue heavy. If imports remain large, though, and movement does not turn strong, the relatively large supply may keep prices steady.

In response to good demand, the total pack of frozen concentrated grapefruit juice (FCGJ) has increased for the last several years. Florida packers processed 21.9 million gallons of FCGJ this season (excluding reprocessed gallons), up 4 percent from last season. So, the larger pack and carryover at the beginning of the season have resulted in sharply larger supplies of FCGJ. Reflecting lower prices, total movement through October 16 amounted to 17.2 million gallons, up 7 percent from last year. F.o.b. prices have been steady at $3.60-$3.62 a dozen 6-ounce cans (unadvertised brands, Florida canneries), compared with $3.78 a year ago. However, the larger carryover and pack more than offset increased movement—leaving the stocks on hand on October 16 sharply above a year earlier. So, even with a moderately smaller crop for 1982/83, total supplies of FCGJ will be ample. Consequently, prices may not change much.

Chilled Citrus Juice Pack Substantially Smaller

With the back-to-back freezes in 1981 and 1982, the total pack of chilled orange juice in Florida declined for the second consecutive year. It amounted to 181 million gallons (excluding single-strength reprocessed), down 15 percent from 1980/81. The decrease is caused by both the reduced tonnage of fresh oranges and smaller quantities of frozen orange concentrates. Following the higher prices of fresh oranges, prices of chilled orange juice have been strong throughout the season. Higher prices, combined with the sluggish economy, have weakened demand for chilled orange juice. Domestic movement of chilled orange juice during 1981/82 totaled 179 million gallons, a decrease of 14 percent from the preceding season. Likewise, exports fell 29 percent from last season. As a result of sharply slower movement, yearend stocks were slightly above a year earlier.

With a larger crop and a higher juice yield, the total pack of chilled orange juice may rise during 1982/83. However, if the economy does not improve, demand for chilled orange juice may remain sluggish. As a result, prices may not increase.

A smaller quantity of grapefruit was processed for chilled grapefruit juice in Florida. The total pack amounted to 23 million gallons (excluding single-strength reprocessed), off 12 percent from 1980/81. The weak economy and higher prices also resulted in slack movement—down 12 percent from 1980/81. Despite the reduced movement, the smaller carryin and pack caused the carryover to be well below a year earlier. With a smaller crop, the pack in 1982/83 will likely be down. However, the total supply is still likely to be adequate for market needs. Consequently, prices may remain relatively steady.

Canned Citrus Pack Down Except for Grapefruit Juice

A smaller pack of canned citrus items, except canned grapefruit juice, was also recorded for 1981/82. The total pack of canned citrus items amounted to 29.4 million cases (24-2's), down 2 percent from 1980/81.

With a 10-percent increase in the canned grapefruit juice pack, the total supply rose almost 8 percent from the previous season, and Florida packers have offered promotional allowances. Recently, packers offered to reduce list prices from $6.40 to $5.92 per dozen 46-ounce cans on orders through October 1. Prices have now returned to $6.40, compared with $7.50 a year ago. Total movement was 14.7 million cases (24-2's) during 1981/82, up 3 percent from last season. But because of a substantially larger pack, yearend stocks were still 29 percent larger than the previous season. Even with a smaller crop, lower grapefruit prices, coupled with a larger carryover, could hold canned grapefruit juice prices at current levels during 1982/83.

During the 1981/82 season, Florida packers processed 11.5 million cases of canned orange juice (24-2's), off 12 percent from the preceding season. F.o.b. prices had remained steady at $9.75 per dozen 46-ounce cans (single-strength, sweetened and unsweetened) until mid-September, when Florida packers raised prices to $10.25. Recently, prices have returned to $9.75. This compares with $9.00 a year ago. Movement in 1981/82 was sluggish, amounting to 11.6 million cases (24-2's), off 11 percent from a year earlier. Even with reduced movement, the smaller pack and carryover resulted in yearend stocks of 2.4 million cases (24-2's), 4 percent less than a year earlier.

With the steadily decreased movement, the pack of canned orange juice is expected to continue to decline. However, supplies of canned orange juice will still be adequate for market demand during 1982/83. Consequently, prices are not expected to advance.

FRESH NONCITRUS

The 1982 noncitrus fruit crop is forecast at 13.1 million tons, 9 percent above last year but still 7 percent below 1980. Although production of the principal summer fruits was smaller, it was more than offset by larger crops of apples and grapes. Available supplies of fresh and processed noncitrus fruit this fall and winter will be adequate, since there are larger supplies of fresh apples, grapes, and frozen fruit and berries. Thus, prices of some processed fruit may not rise, and some fresh fruit prices may decline below a year earlier.

Apples

Crop Substantially Bigger

The final forecast of the 1982 U.S. apple crop is 8.46 billion pounds, 9 percent more than last year. After August 1, prospects deteriorated somewhat, with production down slightly in all three regions from early expectations.

The Eastern States expect a crop of 3.12 billion pounds, 12 percent above last year. New York, the leading apple State in the region, expects 1.13 billion pounds, up 41 percent from 1981. The New York trees are heavy with fruit, but apple size is smaller than normal. Except for North Carolina and Virginia, other major producing States in the region also show substantial increases.

Table 6—U.S. noncitrus fruit: Total production 1980, 1981, and indicated 1982

Crop	1980	1981	1982
	1,000 tons		
Apples	4,414	3,872	4,229
Apricots	129	89	102
Cherries, sweet	172	153	159
Cherries, tart	109	67	155
Cranberries	135	130	137
Grapes	5,595	4,458	5,680
Nectarines	191	182	150
Peaches	1,540	1,394	1,109
Pears	897	892	783
Prunes and plums[1]	823	766	573
Total	14,005	12,003	13,077

[1] Assuming a 3.0 dry away ratio for the 1982 estimated 130,000 tons of California dried prunes.

Source: *Crop Production*, SRS.

In the Central States, prospects are for a crop of 1.46 billion pounds, 26 percent above last year. A larger Michigan crop is chiefly responsible; Michigan apple growers expect to harvest 950 million pounds, 44 percent more than last year. The Ohio crop, at 165 million pounds, is 65 percent above 1981.

Prospects in the Western States are for a crop of 3.88 billion pounds, 2 percent above the 1981 harvest. Although fruit size and quality are generally good, the Washington apple crop is not as large as earlier expected. Nevertheless, the leading apple-producing State in the Nation, Washington, expects 3 billion pounds, 9 percent more than last year. By contrast, California growers expect to harvest 23 percent less than in 1981.

Lower Prices Likely

Shipments of fresh apples are running behind last year's pace because of the late harvest. With a larger crop, supplies of fresh apples are expected to be adequate to meet market demand.

Processor demand for this year's apples is uncertain. Although carryover stocks of processed apple products are below a year earlier, movements of both canned apples and applesauce are also well below a year ago. Slow movement may discourage packers from processing a large quantity of apples. Nevertheless, trade sources indicate that processors are likely to pack more canned apple products than last season. With smaller carryover stocks and relatively good movement, processor demand for juice apples is expected to be good.

Table 7—Apples: Regional production, 1980, 1981, and indicated 1982

Area	1980[1]	1981[1]	Indicated 1982
		Billion pounds	
East	3.37	2.78	3.12
Central States	1.44	1.15	1.46
West	4.02	3.81	3.88
Total U.S.	8.83	7.74	8.46

[1] Includes unharvested production and harvested not sold (million pounds): United States: 1980—18.0, 1981—47.7.

Source: *Crop Production*, SRS.

Table 8—Red Delicious Apples: Shipping point prices, selected regions, 1981 and 1982

Shipping points	Mid-October f.o.b. prices 1981	1982	Units
Western Michigan	7.25	6.08	Per carton, U.S. Fancy 2 1/4" up, 12-3 lb. film bags
Appalachian District	11.00	9.00	U.S. Comb. Extra Fancy and Fancy, tray pack, 88-113's
Yakima Valley, Washington	13.00	10.83	Per carton, tray pack, Wash., State Extra Fancy, 80-113's

Source: F.o.b. prices, AMS.

Opening f.o.b. prices for fresh apples at major shipping points showed a mixed pattern, but they have declined to levels well below last year in most areas. In mid-October, f.o.b. prices for Red Delicious apples at Yakima Valley-Wenatchee, Washington, were quoted at $10.83 a tray pack, size 88-113, U.S. extra fancy, compared with $13.00 a year earlier. Prices are expected to weaken further as supplies continue to increase this fall. In addition, the larger navel orange crop from California will exert some downward pressure on apple prices. Also, with a larger apple crop from Washington, grower prices later in the season are expected to be below the unusually high levels attained last season.

Export demand will also be important to apple prices this season, but the export outlook is not very encouraging. Western Europe expects a bumper crop, with the two key exporting countries, France and Italy, anticipating larger crops—26 and 29 percent, respectively. West Germany, a key importing country on the continent, is expecting a crop more than two and half times last year's output. In addition, in Canada, our leading apple customer, the apple crop is expected to be nearly 12 percent larger than last year. However, the markets in the Far East, particularly Taiwan, could improve if more refrigerated containers are used instead of dry vans for shipping apples in Washington. Exports to the Mideast and Latin America may remain relatively steady.

Exports of apples (mostly old crop) during the first 3 months of the 1982/83 season (July-September) were weak. Smaller shipments were indicated for most areas. Exports should improve from current levels as larger supplies of new apples will become available this fall.

Prices for processing apples have been negotiated below the high levels of last season. Many applesauce packers in Michigan have agreed to pay $6.75 per cwt for hard-variety processing apples (2-1/2 inches and up), compared with $7.25 a year ago. In the East, apples for processing use were offered at slightly lower prices—$3.80 per cwt for York in Virginia (U.S. No. 1 grade, 2-3/4 inches and up), compared with $3.87 last year. As a result, prices of canned apple products are not expected to advance appreciably.

Retail prices of fresh apples were well above a year ago, but they dropped substantially in September to levels only moderately above a year ago. Prices will likely decline to levels below a year ago in the late fall and early winter, when supplies increase seasonally.

Avocados

Record Crop Expected from Florida

Production of Florida avocados for certified shipment in 1982/83 is estimated to be a record 1.25 million bushels. If realized, this will be 28 percent more than the 977,000 bushels shipped last season.

Shipments of Florida avocados through September totaled 604,800 bushels, more than double last year's levels. As supplies of California avocados have been smaller this season, the f.o.b. prices for the Florida fruit are relatively firm. In mid-October, shipping point prices for Florida avocados in Dade County were quoted at $4.25 a 1-layer carton, sizes 10-14, compared with $3.25 a year earlier. Prices are likely to weaken somewhat when larger supplies of California avocados become available this winter. The 1982/83 season-average price for Florida avocados may be near last season's low $388 a ton.

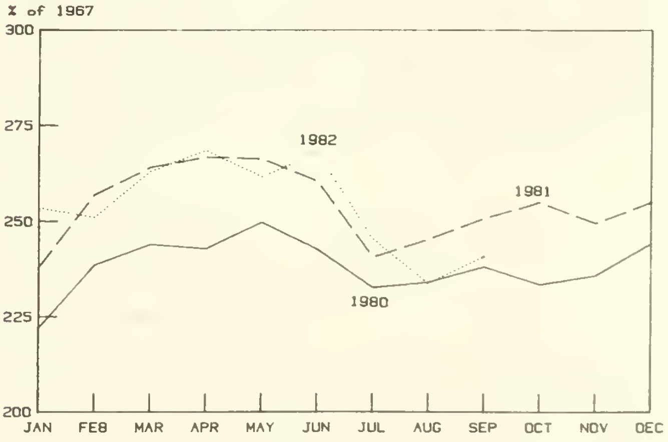
The forecast of California avocado shipments for 1981/82, as reported by the California Avocado Commission, is 6.2 million bushel equivalents, 35 percent below the preceding season. Because of a smaller crop, only a small quantity of avocados remained to be harvest by early October. So far this season, f.o.b. prices for California avocados have been firm. Early season projections for the 1982/83 season are for 9 million bushel equivalents, very near the record-high 9.52 million bushel equivalents shipped in 1980/81.

Bananas

Imports Up Slightly

U.S. imports of bananas during the first 9 months of 1982 totaled almost 2 million metric tons, slightly above last year. Most principal suppliers showed increases. Ecuador retains its status as a leading supplier with 23.6 percent of the market, followed by Honduras with 22.1 percent, and Costa Rica with 21 percent. Colombia recorded the largest percentage increase, up 34 percent from a year ago, and accounted for 15.2 percent of the market in 1982. However, sharp decreases in imports were indicated for Nicaragua and Panama.

Wholesale prices of bananas during the first 9 months of 1982 have averaged slightly lower than a year ago. The September price of $6.31 per 40 pounds was down 20 percent from a year earlier. Retail prices of bananas declined this summer. The September retail price averaged 34.2 cents a pound, compared with 35.8 cents a year ago. The weak prices were caused by the competition from large supplies of summer fruits and melons. So, with larger supplies of apples and oranges, retail banana prices may remain below year-earlier levels.


Bananas: BLS Consumer Price Index

USDA Neg. ERS 163-82 (10)

Cherries

Sweet Cherry Crop Up

Total U.S. sweet cherry production for 1982 was 158,820 tons, 4 percent above 1981 but 8 percent below

1980. At 66,500 tons, Washington, the leading State, had a crop 43 percent above a year ago and accounted for 42 percent of the U.S. crop. Oregon remained in second place even though production fell to 35,000 tons, down 12 percent from last year. California slipped from third to fourth place as production there decreased from 32,800 to 11,400 tons, down 65 percent. Nevertheless, the three Pacific Coast States accounted for 71 percent of the total 1982 crop. Michigan rose to third place, as production increased by 46 percent to 33,500 tons.

Because of smaller available supplies for the fresh market and good demand, prices received by growers for 1982 sweet cherries averaged $700 a ton, compared with $683 in 1981. The smaller California crop resulted in grower prices for fresh market cherries being almost 67 percent above 1981. However, utilized production was 7 percent smaller because of unfavorable weather at harvest, so the total 1982 crop was valued at $95.4 million, off almost 5 percent from 1981.

The reduced utilized production resulted in lower use for fresh market and brining, while cherries used for canning, freezing, juice, and jelly increased slightly. Utilization of sweet cherries for fresh market fell 4 percent, while those for brining decreased 13 percent. Table 9 shows the use of the U.S. sweet cherry crop during the last 4 years.

Tart Cherry Crop Largest Since 1972

The Nation's 1982 tart cherry crop totaled 311 million pounds. This was more than twice as large as the 1981 crop, and the biggest since 1972. With a crop in Michigan almost 3 times as large as a year ago, the four Great Lake States produced 297 million pounds, up from 114 million pounds in 1981, and accounted for 95 percent of the total U.S. crop. New York, the second largest producer, had a crop of 21 million pounds, compared with 8.4 million in 1981. However, the combined production of the three States in the West (Colorado, Oregon, and Utah) shows a sharp decrease.

In response to the dramatically increased crop, grower prices for 1982 averaged 14.1 cents a pound, compared with 44.5 cents. Consequently, despite the larger output, the crop is valued at only $35.8 million, down 40 percent from 1981. Table 10 shows the use of tart cherries during the last 4 years.

Table 9— Sweet cherries: Production, utilization, price, and value, 1979-82 crops

Crop	Production		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other[3]		
				1,000 short tons			*Dollars*	*1,000 dollars*
1979	182.0	181.8	83.8	14.9	75.1	8.1	601	109,212
1980	171.7	166.3	84.5	14.4	59.5	7.9	552	91,812
1981	153.0	146.0	70.2	10.3	55.0	10.5	683	99,792
1982	158.8	136.3	67.2	11.0	47.7	10.5	700	95,455

[1] Difference between total and utilized is quantities harvested but not sold and quantities not harvested. [2] Some totals do not add due to rounding. [3] Includes frozen, juice, jelly, etc.

Source: *Crop Production*, SRS.

Table 10—Tart cherries: Production, utilization, price, and value, 1979-82 crops

Crop	Production		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other[3]		
				1,000 short tons			*Dollars*	*1,000 dollars*
1979	85.2	85.2	2.2	23.0	58.2	2.0	944	80,505
1980	109.1	108.1	3.2	35.6	67.7	1.7	404	43,725
1981	67.3	67.1	2.0	20.2	43.9	1.1	890	59,690
1982	155.5	127.5	3.7	18.2	94.4	11.3	282	35,832

[1] Difference between total and utilized is quantities harvested but not sold and quantities not harvested. [2] Some totals do not add due to rounding. [3] Includes juices, wine, jam, etc.

Source: *Crop Production*, SRS.

Grapes

Crop Sets Record

With prospects slightly improved after September 1, the final forecast for the U.S. grape crop is a record-high 5.68 million tons, 27 percent greater than last year. If the forecast is realized, the 1982 output will be 2 percent above the 1980 record. California's crop improved from a month ago and is now forecast at 5.2 million tons, 30 percent above last year. The increase from last month was in the wine-variety grapes. Consequently, California grape output this year accounts for almost 92 percent of the total U.S. crop, compared with 90 percent a year ago. The California raisin-variety grape forecast remains at 2.5 million tons, 41 percent above 1981. Rain fell on September 25 as about two-thirds of the raisin crop lay on open trays in the vineyards. Clear weather the last week of the month allowed growers to move trays out of wet spots, and much of the damaged crop will be salvaged. However, the total loss is still unknown at this time.

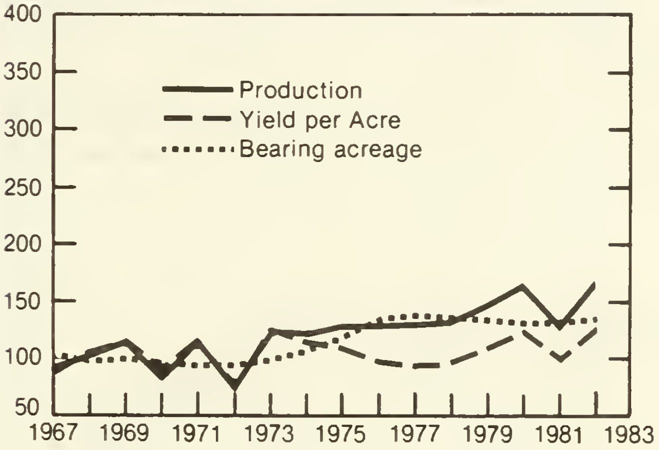
The California wine-variety grape forecast is at a record-high 2.2 million tons, 23 percent above last year and 10 percent above the 1980 record. Yield is also forecast at a record—7.7 tons per bearing acre. High humidity accompanied the late September rains and has caused mold and bunch rot to develop. Assessment of the overall damage is continuing. In spite of weather problems, record yields are being recorded and record tonnages being delivered for crushing.

The California table-variety grape forecast as of October 1 is 500,000 tons, unchanged from last month but 19 percent above 1981. The extent of the damage caused by the rain is still unknown. Emperor, the largest fall variety, appears to have escaped harm.

California Grapes: Acreage, Yield and Production

Total Grapes

% of 1967 - 1969 avg.



Raisin Grapes

% of 1967 - 1969 avg.

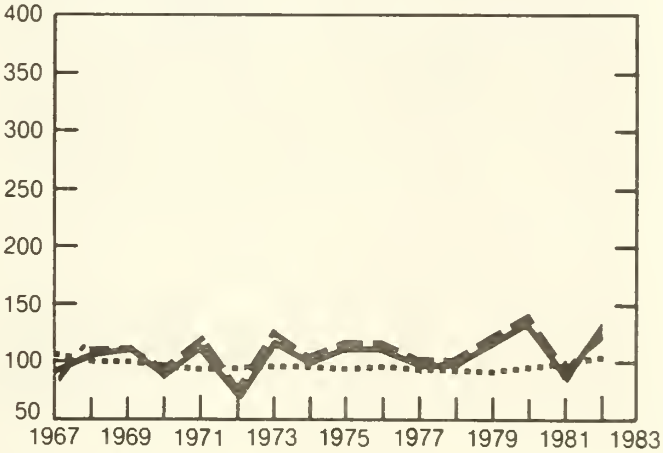
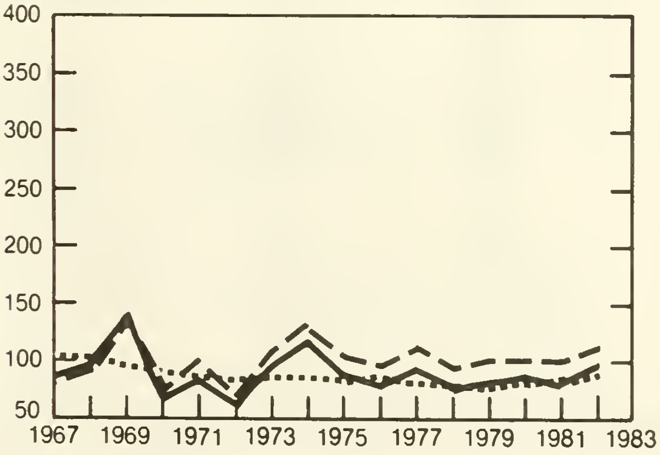


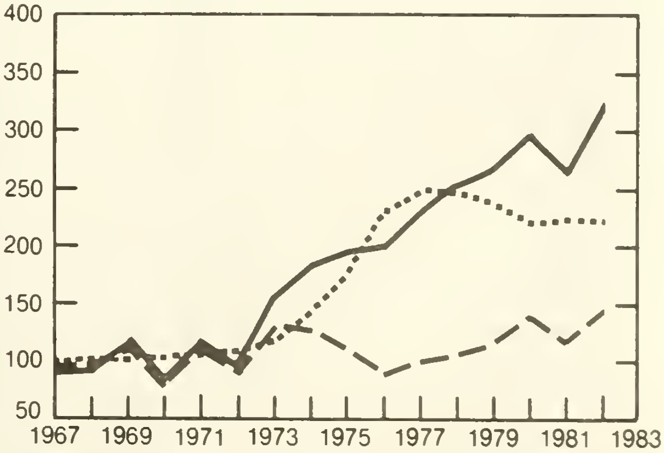
Table Grapes

% of 1967 - 1969 avg.



Wine Grapes

% of 1967 - 1969 avg.



1981 preliminary. 1982 indicated.

USDA

Neg. ERS 841-82(10)

Potential grape output in California is still expected to increase during the next few years, consistent with the increase in bearing acreage. Trends for bearing acreage, production, and yield per acre for California grapes, by variety, are shown in the accompanying chart.

Total grape production from States other than California is now forecast at 479,600 tons, up slightly from last year, primarily reflecting larger crops from New York, Arkansas, and Michigan. The New York grape forecast, 166,000 tons, is 11 percent above last year but 5 percent less than 1980. Average to above-average size and quality are being reported. The Michigan grape forecast is 55,000 tons, 4 percent more than 1981, while prospects in Arkansas are for a crop of 8,500 tons, up 42 percent from last year. However, Washington, the third largest producing State, expects to harvest 157,000 tons, slightly below a year ago.

Prices under Downward Pressure

Through mid-October, shipments of fresh table grapes amounted to 849 million pounds, sharply above a year ago. Consequently, grape prices have been under downward pressure. By mid-October, Thompson Seedless was quoted at $8.50 a 23-pound lug in Kern County, California, compared with $20.50 a year earlier. F.o.b. prices for fresh table grapes are expected to strengthen somewhat as supplies decline seasonally. However, the season-average price received by growers for table grapes is expected to be substantially below 1981.

Demand for fresh table grapes so far this season has been good. However, exports during the first 4 months of the 1982/83 season (June-September) totaled 44,735 metric tons, down 23 percent from a year earlier, due to sharply lower exports to Canada. Exports to Hong Kong showed significant gains.

Drying Down Drastically

Because of weather conditions this season, raisin deliveries to handlers are running well below a year ago. The September storms have made any estimate of this year's raisin production, at best, very difficult. Consequently, the market was unsettled in mid-October, and most packers remain withdrawn from the bulk raisin market, awaiting full reports of crop damage. Growers tried to salvage as much of this year's crop as possible, but some of the damaged raisin grapes delivered for wine were beginning to show some mold damage. The industry is currently forecasting a total production of 125,000-150,000 tons of raisins, less than one-half of the 270,000-300,000 tons previously estimated.

Crush is Small

Reported use of California grapes for crushing through October 16 was 2.7 million tons, up from 2.22 million a year earlier. Larger crushes were recorded for all variety types of grapes. However, the crush has been accelerated in recent weeks. The increase could be partially attributed to a large quantity of damaged raisin-variety grapes delivered to wineries.

The larger grape crops this year in States other than California, especially New York, Michigan, and Ohio, are expected to result in a larger crush of Concord and other American-type grapes.

Lower sugar levels and a larger crop have lowered winery prices to grape growers substantially from a year ago. Prices vary greatly by producing areas, supplies,

Table 11—Grapes: Total production and season-average prices, received by growers in principal States, 1980, 1981, and indicated 1982 production

State	Production[1]			Price per ton[2]	
	1980	1981	1982	1980	1981
		Tons		*Dollars*	
New York	175,000	150,000	166,000	218.00	248.00
Pennsylvania	56,000	61,000	55,000	167.00	186.00
Ohio	12,000	10,300	10,500	173.00	188.00
Michigan	49,500	53,000	55,000	240.00	271.00
Missouri	4,200	2,200	2,400	257.00	311.00
North Carolina	5,800	5,100	6,000	276.00	318.00
Georgia-South Carolina	4,500	5,600	5,200	388.00	420.00
Arkansas	6,600	6,000	8,500	170.00	227.00
Arizona	12,400	12,400	14,000	1,170.00	1,240.00
Washington	145,100	159,000	157,000	178.00	189.00
California:					
Wine	2,004,000	1,794,000	2,200,000	210.00	266.00
Table	428,000	420,000	500,000	410.00	440.00
Raisin[3]	2,692,000	1,779,000	2,500,000	237.00	306.00
Dried[4]	309,000	256,000	—	1,205.00	1,315.00
Not dried	1,080,000	755,000	—	245.00	275.00
All	5,124,00	3,993,000	5,200,000	241.00	302.00
United States	5,595,100	4,457,600	5,679,600	239.00	297.00

[1] Includes unharvested production and harvested not sold (tons): U.S. 1980—300, 1981—600. [2] Price derived from unrounded data for California all varieties and raisin varieties. [3] Fresh equivalent of dried and not dried. [4] Dried basis, 1 ton of raisins is equivalent to 5.22 tons of fresh grapes for 1980 and 4.00 tons for 1981.

Sources: *Production, Crop Production and Prices, Noncitrus Fruits and Nuts Mid-Year Supplement*, SRS.

and variety grapes. For good quality white-variety grapes, prices ranged from $175 to $600 a ton in early October.

Wholesale prices of wines have been substantially above a year earlier. The BLS September wholesale price index for all wines stood at 258.8 (1967=100), up 9 percent from a year ago. Demand for wine has been good. The volume of wine entering distribution channels during the first 6 months of 1982 was 2.7 percent above last year. But the inventories of wines as of June 30 were also higher. The larger inventories and lower grape prices paid by wineries may moderate price increases somewhat.

Pears

Crop Substantially Smaller

The final forecast of the 1982 U.S. pear crop is 783,350 tons, 12 percent less than in 1981. The Bartlett crop in the Pacific Coast region is forecast at 516,000 tons, 13 percent less than last year, primarily reflecting a much smaller crop in California. At 223,500 tons, output of pears other than Bartletts in California, Oregon, and Washington is also 13 percent smaller than last year's crop, as smaller production is indicated for all three States. Pear production in other than Pacific Coast States is forecast at 43,850 tons, up almost 8 percent from 1981. Sharply larger crops in Michigan and New York were chiefly responsible.

Prices Moderately Higher

With a smaller crop, shipments of fresh pears through mid-October were running moderately behind last year's pace. Deliveries of pears for processing were also well below last year's levels. F.o.b. prices for Bartlett pears have been generally higher than a year ago. For the week ending October 15, the f.o.b. price quotation for Bartlett pears at Yakima Valley, Washington, was $8.85 a box, U.S. No. 1, size 100-125, compared with $8.75 a year ago. Prices of winter pears are not expected to strengthen appreciably even with a smaller crop. Larger supplies of apples and oranges could exert some downward pressure on pear prices.

A moderately larger carryover and slow movement of canned pears have resulted in lower prices for Bartletts for processing use. California growers and canners have agreed on a field price of $135 a ton for No. 1 grade Bartletts, compared with $165 a year ago. The Washington-Oregon Canning Pear Association reported the cannery price for No. 1 Bartletts, 2-1/2 inches and larger, at $135 a ton, compared with $150 in 1981. The lower price could be reflected in retail prices of canned pears. Packers have already offered promotional allowances to reduce prices of canned pears and to stimulate sales.

Table 12—Pears: Shipping point prices, selected regions 1981 and 1982

Shipping points	Mid-October f.o.b. prices 1981	Mid-October f.o.b. prices 1982	Units
Lake County Dist., California Bartlett	10.33	[1]10.55	U.S. No. 1, std. box wrapped pack, 100-125's
Yakima Valley, Washington Bartlett	8.75	8.85	U.S. No. 1, std. box wrapped pack, 100-125's

[1] Week ending October 8.

Source: F.o.b. prices, AMS.

Export Prospects Poor

Exports of fresh pears during the first 3 months of 1982/83 (July-September) totaled 7,449 metric tons, down 27 percent from a year ago. Lower shipments were indicated for almost all the importing countries. Prospects for exports of winter pears also do not look very favorable because of the appreciation of the U.S. dollar against currencies in Canada and Europe and the sluggish economic conditions in these areas.

PROCESSED NONCITRUS

This season's supply of processed noncitrus fruit will be adequate, reflecting the overall increase in fruits and berries. There were, of course, some exceptions—peach production was much lower than normal, and this was reflected in the reduced canned pack. Overall, canned and dried supplies decreased, as the frozen pack and cold storage stocks increased.

Cold Storage Stocks Up Moderately

The October 1 estimates for frozen fruits and berries show cold storage stocks at 587 million pounds, up 4 percent from 1981. Of the 11 fruits listed, only 4 had lower stocks this year. Apple, blackberry, sweet cherry, and peach cold storage stocks declined sharply from October 1, 1981. Apricots, boysenberries, tart cherries, and red raspberries made the largest gains. Despite vastly reduced Mexican imports, frozen strawberry stocks were still up slightly over a year earlier.

Frozen Fruit and Berry Supplies Increase

This season's frozen fruit and berry pack will exceed the 1981/82 level and likely equal or surpass the 1980/81 high. It is estimated that frozen strawberry imports from Mexico this season will be down sharply. Nevertheless, the industry sources place that 1982 pack of frozen strawberries at 318.9 million pounds, a substantial increase from 1981. So, total supplies for the 1982/83 marketing season will be up from the previous season. Deliveries of red raspberries, boysenberries, and loganberries to freezers increased over last season, while those of blueberries and blackberries fell.

The 1982/83 frozen tart cherry pack is double that of last year, reflecting the abundant crop. This season, 189 million pounds went to freezers—a sharp jump in absolute terms, but a 10-percent drop in percentage shares. As no reserve was allowed, the marketable amount available will equal the total supply. Late October f.o.b. prices for frozen Grade A cherries from Michigan were generally 41 cents a pound, and occasionally 39 cents, sharply lower than 1981 prices but about even with 1980.

Dried Fruit Production Down

Despite early prospects for a good raisin outturn, the industry now indicates a sharply reduced raisin output for this season after the California rain. To compensate for the portion of the crop lost, the Raisin Administrative Committee offered the rest of its 1981/82 reserve pool to growers. The August 1 carryin was 105,018 tons, down 10 percent from 1981 but still a noteworthy amount. Shipments during the first 3 months ending October were down substantially from a year earlier. Given these factors, it is likely that the total supply of raisins for 1982/83 will meet market needs.

The Raisin Bargaining Association made its offer to packers on October 5. The field price for natural seedless was $1,300 a ton, only $25 more than the 1981 offer. The September BLS wholesale price index was 445.5 (1967=100), down from last year's price. Raisin prices could advance moderately during the upcoming year, but adequate supplies and indications of light demand make any sharp gains unlikely.

The outlook for raisin exports is not especially promising. The European Community (EC) has established a minimum import price of about $1,000 per metric ton and intends to sell Greek raisins at this price with the aid of a huge subsidy. Also, the world demand for raisins seems to be outstripped by the supply. Export prospects are not furthered by the price level, either, as foreign producers can and do sell for less.

The September estimate for dried prune production was 130,000 tons (natural condition), down 18 percent from 1981. The 1982 carryover, at 64,197 tons, is sharply larger than last year, but when combined with total production, it still means a substantially reduced supply.

Prune shipments got off to a mixed start. Export shipments were down again through the first 3 months of 1982/83—16,204 metric tons (processed condition), compared with 19,538 a year earlier. France expects record dried prune production, and as a result, it is likely that the U.S. prune market in Europe will remain sluggish. Domestic shipments are sharply ahead of the same 2 months (August-September) last year, at 17,403 tons. Even with substantially lower exports, the smaller crop and good domestic movement may firm prices somewhat this season. The September BLS wholesale price index (1967=100), at 254.8, was 4 percent below a year earlier.

Table 13—Stocks of frozen fruit: End of September 1979-82

Frozen fruit	1979	1980	1981	1982
	Thousand pounds			
Apples	37,578	36,022	39,968	31,693
Apricots	14,053	10,001	9,160	12,319
Blackberries	11,870	30,072	26,420	21,747
Blueberries	45,276	44,082	38,763	40,636
Boysenberries	2,941	6,022	4,937	8,234
Cherries[1]	87,281	115,931	86,849	113,511
Grapes	6,257	5,002	3,405	4,000
Peaches	53,672	52,099	58,402	50,903
Raspberries	[2]21,599	[3]23,362	[3]22,582	[3]30,630
Strawberries	177,244	210,841	171,845	174,707
Other frozen fruits	96,206	98,218	100,740	98,370
Total frozen fruits	553,977	631,652	563,071	586,750

[1] Includes both sweet and tart cherries. [2] Includes red and black raspberries; black raspberries included in other frozen fruit beginning 1980. [3] Red raspberries only.

Source: *Cold Storage*, SRS.

Canned Fruit Supplies Down Substantially

The reduced supply of summer fruits, the sluggish economy, and dampened demand are factors which help explain the anticipated decline in canned fruit supplies. Industry sources, based on the current harvest and stock data for the major canned items, imply that the 1982/83 supply will be substantially less than a year ago. Given the downturn in demand for canned fruit, though, current supplies seem to be adequate.

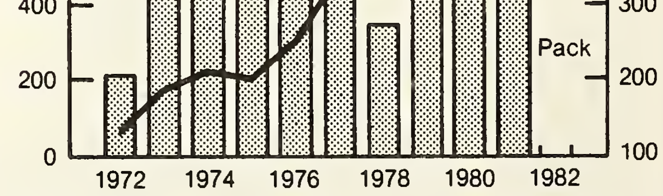
The 1982 canned cling peach pack is 17.9 million cases (24-2-1/2 basis), the smallest since 1958. So, even with a larger carryover, the total supply of 25.7 million cases is moderately less than the 1981/82 total of 27.3 million cases (24-2-1/2 basis). Freestone peaches, according to trade analyses, are down sharply. The California Freestone Peach Association's estimates place deliveries to processors at 75,100 tons. Of this amount, approximately 23 percent went to canners, substantially less than a year earlier. This, coupled with a 41-percent drop in the June 1 carryover, implies a decline in overall supply.

Cases of canned pears and fruit cocktail (24-2-1/2 basis) follow the same pattern. Fresh production of pears declined from 1981, and canners took less, too. Hence, the 1982/83 total supply of canned pears is expected to dip substantially from 1981/82's 14.6 million cases. With marked declines in peach and pear production, the fruit cocktail pack, at 8.8 million cases, is sharply less than a year earlier. Canners indicated that there will be approximately 15 percent fewer cases of 24-2-1/2 cans this season, the second consecutive decline in total supply, but close to the 1979/80 figure of 15.5 million cases.

Canned cherries show a mixed performance in 1982. The tart cherry pack, at 471,498 cases (24-2-1/2 basis), is 121 percent more than in 1981 but still 10 percent less than in 1980. The sweet cherry pack is estimated at 498,124 cases (24-2 1/2 basis), sharply above both the 1980 and 1981 packs. As a result, the total supply of canned tart cherries will be ample, while that of canned sweet cherries will be only slightly larger than last season.

The 1982/83 canned apricot supply is expected to be down 18 percent from last season. The purple plum carryover is up 23 percent, but the pack will likely be

U.S. Raisin Pack and Wholesale Price Index

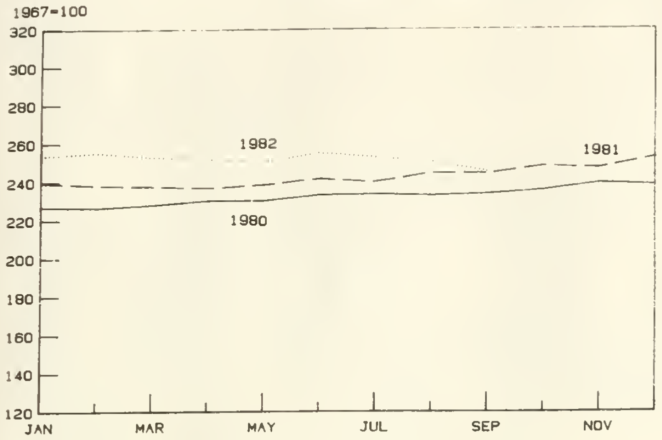


*15 oz. packages.

USDA

Neg. ERS 164-82(10)

Canned Fruit: BLS Wholesale Price Index



USDA Neg. ERS 0975-82 (10)

less than in 1981. The overall supply should be adequate, although less than a year ago.

The larger apple crop could result in a larger supply of canned apple products. Stocks of canned apples, applesauce, and juice are all down this season. On the other hand, demand is weak and so are prices, so the need to bolster overall supply is lacking. The size of the 1982/83 apple pack will ultimately be determined by demand for the product and by general economic conditions.

The September BLS wholesale price index for canned fruit reflects the declining rate of inflation and weak demand for canned goods. The index stood at 245.4 (1967=100), virtually unchanged from a year earlier. Reduced supplies could result in higher prices but, again, given the subdued economic climate and lackluster demand, it is doubtful that prices will advance much.

Exports of canned fruit showed a mixed performance during the first 4 months of 1982/83. Tart cherry exports were more than 8 times above the comparable period a year earlier. Fruit cocktail exports were down 16 percent from 1981/82. Peaches and pears also declined. No major gains in exports are expected, because of the tight world economic situation and the strength of the dollar.

BERRIES

Cranberries

Bumper Crop Forecast

Cranberries appear to be in abundant supply this season. A record 2.75 million barrels are forecast, up 6 percent from 1981.

The quality of the 1982 crop appears good. According to industry sources, some Massachusetts growers think early varieties lack size. The smaller size, however, is not expected to seriously affect overall quality. Wisconsin, another top producer, reports good color and quality, with normal to above-normal size.

The industry continues to promote the production of fresh cranberries by offering grower price incentives. Such encouragement is needed to offset the higher costs of harvesting fresh berries. If the excellent growing season continues, it is likely that the proportion of fresh to processed berries will increase again this year. For the week ending October 19, the Chicago wholesale market price for Massachusetts cranberries, at $16.25 per 24-1 pound film bags, was about even with a year earlier. The incentives plus strong demand could mitigate the downward pressure on grower prices caused by the larger crop.

TREE NUTS

Supplies of tree nuts will be slightly less this year. The pecan, walnut, and almond crops are all below last year. Filbert production, though, is expected to reach record levels. Grower and consumer prices will likely advance slightly from 1981.

Almonds

Production Down Moderately

The 1982 almond crop, at 365 million pounds, is moderately less than a year ago. Heavy rains in mid-September damaged some of the Peerless variety (a minor variety that is usually marketed inshell). Industry sources express anxiety about the proportion of the crop affected by rain, but the full extent of the damage has yet to be fully assessed. Production in Spain and Italy, the leading European producers, is down sharply from last year, but the worldwide buildup of almond stocks in 1981 will offset the decrease in production.

Because of the lower outturn, grower prices are expected to average moderately to substantially above the 1981 rate of 71 cents a pound (kernel weight).

Domestic and foreign shipments for 1982/83 got off to a brisk start. During the first 3 months, domestic shipments were 30 million pounds (kernel weight), 20 percent over the comparable period in 1981. Exports showed a less dramatic increase. Exports totaled 58 million pounds, compared with 55 million a year earlier. West Germany remains the leading importer of U.S. almonds. U.S. prospects for exports to the EC could improve, depending on the value of the dollar and the price of European almonds and competing nuts. The most significant factor influencing 1982 almond sales is the possible increase in world consumption.

Filberts

Record U.S. Crop Expected

A record filbert crop is forecast for 1982. This year's crop, at 17,000 tons (15,400 metric tons), is substantially larger than either the 1981 or 1980 harvests. Oregon and Washington, the leading producers, estimate production at 16,700 and 300 tons, respectively. Both are showing major increases because new plantings have come into production. The nut set is excellent, and growing conditions point to a good crop.

Turkey continues to dominate the world market for filberts. In 1982, Turkey harvested an estimated 250,000 metric tons, more than one-third below the 1981 crop

Table 14—Tree nuts: Production in principal States, 1980, 1981, and indicated 1982

Crop and States	1980	1981	Indicated 1982
		1,000 pounds shelled basis	
Almonds:			
California	322,000	407,000	365,000
		Short tons In-Shell Basis	
Filberts:			
Oregon	15,100	14,400	16,700
Washington	300	300	300
2 States	15,400	14,700	17,000
Walnuts, English:			
California	197,000	225,000	220,000

Crop and State	1980	1981	Indicated 1982
		Short tons in-shell basis	
Pecans:			
North Carolina	850	2,100	1,150
South Carolina	1,100	4,450	1,750
Georgia	52,500	60,000	55,000
Florida	3,000	2,500	2,250
Alabama	10,000	17,000	12,000
Mississippi	2,250	4,250	2,500
Arkansas	450	2,750	650
Louisiana	7,000	12,000	6,000
Oklahoma	1,750	23,500	2,500
Texas	5,500	31,000	12,500
New Mexico	7,350	10,000	9,000
Total	91,750	169,550	105,300
Improved varieties[1]	64,250	87,275	74,750
Native and seedling	27,500	82,275	30,550
Total 3 tree nuts[2]	304,150	409,250	342,300

[1] Budded, grafted, or topworked varieties. [2] Excludes almonds.

Source: *Crop Production*, SRS.

because of bad weather. However, the country will probably export all of its tonnage. Again mounting an aggressive export campaign, the Turkish Government has authorized a 30-percent increase in its price support rate. Given its large filbert carryover, current world demand, and prices, Turkey will likely continue to register gains against its competitors, Italy and Spain.

World filbert production for 1982 is expected to be sharply less than in 1981. However, Italian production, at 100,000 metric tons, was up sharply over 1981. Spanish production declined 20 percent from the previous season. Both Italian and Spanish export shares fell during the early part of 1982 because of stiff competition from Turkey. However, the EC has sharply increased export restitutions for Italian almonds, while Spain offers both export restitution and tax refund.

Given adequate domestic supplies of filberts and competing nuts, the United States could see a moderate drop in filbert imports. Last year's price was $786 per ton, compared with $1,152 in 1980. Prices are not established at this time.

Pecans

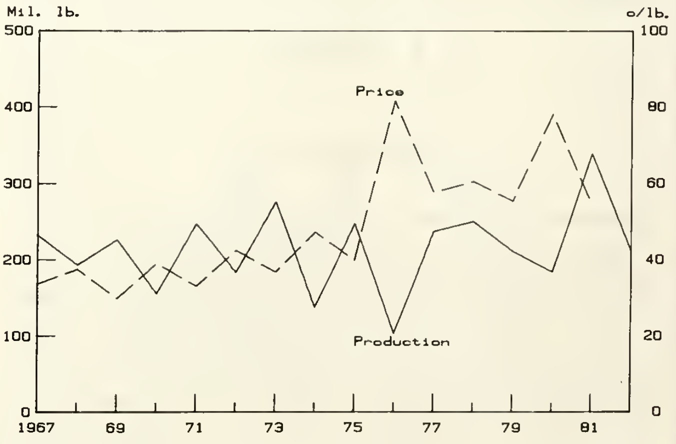
Crop Down Sharply

The 1982 pecan crop, at 211 million pounds, is 38 percent less than a year ago but still 15 percent higher than 1980. Georgia remains the leading producer, expecting a harvest of 110 million pounds. Texas ranks second with 25 million, and Alabama third with 24 million. Without exception, all States experienced production declines. However, industry sources anticipate that there will be an adequate amount available for the market because of the ample supply of nuts in cold storage.

The overall quality of the crop is good despite smaller nut sizes. Georgia, in particular, expects a high-quality crop, despite the heavier rains this season. Oklahoma's pecans were badly damaged by drought and insect infestation. Excess heat in Texas has caused an improper filling of nuts.

Grower prices dropped sharply in 1981 from 1980, because of the larger crop. The 1981 average grower price stood at 55.4 cents a pound, compared with 78.1 the previous year. Grower prices for the 1982 crop are not likely to advance considerably above 1981 because of large carryovers.

U.S. Pecan Production and Prices Received by Grower



USDA Neg. ERS 8834-82 (10)

Walnuts

Walnut Production Down Slightly

The latest estimates indicate that walnut production this season will total 220,000 tons, inshell basis. This estimate is 10 percent higher than the previous one but still shows the crop to be slightly less than the record 1981 outturn. Despite the heavy September rains in California, the walnut orchards escaped unharmed, chiefly because harvesting had barely started. Prior to harvest, nut sets were excellent; the quality is better than normal, with sizes tending to be large.

During the first 2 months of the current marketing year, total shipments of walnuts were substantially more than in 1981 (inshell basis). Exports were up sharply, totaling 9.4 million pounds (inshell basis). Domestic shipments, which account for the lion's share of the market, remained unchanged from a year earlier.

Good export movement thus far has resulted in good prices. However, a record crop in France could mean reduced walnut shipments to Europe this season. Given the slightly reduced crop and steady domestic movement, it is likely that domestic prices will also remain above a year ago.

PER CAPITA TREE NUT CONSUMPTION

In 1981, per capita tree nut consumption rose to the highest level since 1976. Revised estimates place it at 1.85 pounds, compared with 1.73 in 1980 and 1.89 in 1976. Of the five major tree nuts (almonds, filberts, pecans, walnuts, and Macadamias), only almonds and walnuts registered gains. Per capita almond consumption rose from 0.42 pounds in 1980 to 0.51 in 1981, and walnut consumption increased from 0.51 to 0.54 pounds per person. The consumption of pecans (erroneously reported as 0.20 pound per person in the September Fruit Situation) remained at 0.38 pounds in 1981. Filberts, Macadamias, and other nuts also remained unchanged from a year earlier.

Table 15—Tree nuts (shelled basis): Per capita consumption, crop year, 1960-81[1]

Crop year[2]	Almonds	Filberts[3]	Pecans	Walnuts	Macadamias	Other[4]	Total
1960	.30	.07	.36	.32	.004	.52	1.57
1961	.28	.07	.44	.30	.006	.53	1.63
1962	.27	.05	.27	.32	.008	.56	1.48
1963	.27	.05	.45	.32	.010	.47	1.57
1964	.30	.05	.43	.41	.012	.56	1.76
1965	.31	.06	.52	.33	.013	.56	1.79
1966	.33	.07	.41	.37	.013	.54	1.73
1967	.30	.07	.40	.37	.012	.59	1.74
1968	.33	.07	.39	.33	.016	.68	1.82
1969	.30	.05	.42	.34	.015	.58	1.71
1970	.34	.06	.36	.38	.020	.60	1.76
1971	.37	.07	.38	.42	.021	.62	1.88
1972	.36	.07	.38	.39	.019	.72	1.94
1973	.26	.10	.36	.40	.017	.57	1.71
1974	.26	.05	.34	.43	.023	.45	1.55
1975	.35	.08	.33	.52	.025	.61	1.91
1976	.42	.08	.29	.52	.026	.56	1.89
1977	.45	.07	.31	.51	.027	.33	1.70
1978	.40	.08	.33	.39	.028	.47	1.70
1979	.37	.04	.40	.47	.036	.41	1.73
1980	.42	.05	.38	.51	.044	.33	1.73
1981[5]	.51	.05	.38	.54	.044	.33	1.85

[1] Civilian consumption only. [2] Beginning August of year indicated for filberts and walnuts, July for all others. [3] In 1981, the beginning of the crop year for filberts changed from August to May. [4] Includes the following nuts: Brazil, pignolia, pistachios, chestnuts, cashews, and miscellaneous. [5] Preliminary.

Note: The 1981 figure for pecans was erroneously reported as .20 in the September 1982 issue of the Fruit Situation.

Table 16—Seven citrus fruits: Production, use, and value, United States 1979/80 through 1980/82[1]

Fruit and season	Production[2]	Utilization of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
		1,000 short tons				*1,000 dollars*
Oranges:						
1979/80	11,832	2,146	18.1	9,686	81.9	1,327,708
1980/81	10,487	1,967	18.8	8,520	81.2	1,295,281
1981/82	7,640	1,823	23.9	5,817	76.1	1,227,437
Grapefruit:						
1979/80	2,986	1,152	38.6	1,834	61.4	302,683
1980/81	2,759	1,114	40.4	1,645	59.6	321,517
1981/82	2,893	1,167	40.3	1,726	59.7	249,159
Lemons:						
1979/80	789	407	51.6	382	48.4	168,399
1980/81	1,189	433	36.4	756	63.6	151,174
1981/82	942	401	42.6	541	57.4	131,380
Limes:						
1979/80	44	25	56.8	19	43.2	13,805
1980/81	48	28	58.3	20	41.7	13,325
1981/82	52	25	48.1	27	51.9	16,170
Tangelos:						
1979/80	288	81	28.1	207	71.9	29,056
1980/81	221	93	42.1	128	57.9	27,943
1981/82	230	80	34.8	150	65.2	28,496
Tangerines:						
1979/80	275	157	57.1	118	42.9	36,577
1980/81	239	135	56.5	104	43.5	35,850
1981/82	212	135	63.7	77	36.3	40,594
Temples:						
1979/80	270	125	46.3	145	53.7	27,420
1980/81	162	50	30.9	112	69.1	21,595
1981/82	144	38	26.4	106	73.6	19,476
Total:						
1979/80	16,484	4,093	24.8	12,391	75.2	1,905,648
1980/81	15,105	3,820	25.3	11,285	74.7	1,866,685
1981/82	12,113	3,669	30.3	8,444	69.7	1,712,712

[1] Preliminary. [2] Production having value.

Source: *Citrus Fruits*, SRS.

Table 17—Selected citrus fruit: Use for processing by percentage of total production, 1974/75 through 1981/82

State, variety, and season	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80	1980/81	1981/82[1]
				Percent				
Oranges:								
Florida								
Temple	64.0	57.7	68.8	58.2	54.6	53.6	69.3	73.8
Early and midseason	92.3	93.4	94.7	93.5	93.0	94.5	94.5	93.3
Valencia	92.2	93.6	96.2	94.7	92.6	94.9	96.3	94.8
Total	91.8	93.5	95.2	94.1	92.9	94.7	95.2	93.9
California								
Navel and miscellaneous	27.2	27.2	24.7	24.0	31.3	33.4	37.0	20.0
Valencia	43.5	44.5	32.5	39.8	36.4	33.7	50.2	25.0
Total	35.3	35.2	28.1	32.4	33.5	33.5	42.3	21.9
Grapefruit:								
Florida								
Seedless	50.1	50.9	61.5	58.2	53.8	58.6	60.2	60.3
Pink	33.5	31.2	47.8	37.6	28.3	33.6	39.0	43.3
White	57.5	60.0	67.2	68.9	65.4	71.4	71.1	69.5
Other seeded	98.0	98.6	99.3	99.0	99.0	98.7	99.1	98.7
Total	57.9	58.5	68.2	64.9	60.4	64.4	65.9	65.1
Texas	36.3	32.1	47.7	44.5	55.6	46.8	30.6	48.0
Tangerines:								
Florida	28.7	30.5	29.8	40.6	46.0	40.0	36.5	36.4
California	37.0	38.5	33.0	41.4	34.5	52.4	59.1	35.3
Lemons:								
California	56.8	37.1	47.6	51.2	35.0	48.5	62.3	56.9
Arizona	73.3	43.2	58.2	60.3	49.1	48.0	68.0	59.0

[1] Preliminary.

Source: *Citrus Fruits*, SRS.

Table 18—Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box
	Million boxes	*Million boxes*[1]	*Percent*	*Gallons*
1979/80	212.7	174.9	82.2	1.34
1980/81	176.0	145.3	82.6	[2]1.21
1981/82	129.0	105.1	81.5	[2]1.28
1982/83	147.6	NA	NA	1.37

[1] Includes tangelos, Temples, tangerines, and K-early citrus. [2] The reported 42.0 degree level will become effective at the start of the new marketing year on December 1, 1981, for all Florida FCOJ sold in the U.S. in retail and institutional size containers. The yield level previously reported has been for 43.4 and 45.0 degree brix equivalent. The conversion ratio from 43.4 degree to 42.0 degree is 1.03970, and the ratio from 45.0 degree to 43.4 degree is 1.0442029.

NA = not available.

Source: *Crop Production*, SRS.

Table 19—Citrus fruit: Season average equivalent returns per box received by growers, by variety and utilization, by State and total United States, 1980/81-1981/82

Variety, States, and U.S.	1980/81						1981/82					
	Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
	Dollars											
Oranges												
Florida												
Early and midseason	5.27	6.85	5.18	3.67	5.25	3.58	6.34	8.00	6.22	4.64	6.30	4.52
Valencia	6.23	8.65	6.14	4.63	7.05	4.54	6.82	8.60	6.72	5.12	6.90	5.02
All	5.64	7.39	5.56	4.04	5.79	3.96	6.54	8.21	6.43	4.84	6.51	4.73
Temple	6.00	8.45	4.91	4.21	6.70	3.11	6.09	8.50	5.23	4.20	6.65	3.33
California												
Navel and misc.	4.01	6.30	.10	2.61	4.90	-1.30	7.22	8.88	.60	5.58	7.24	-1.04
Valencia	5.15	8.00	2.32	3.65	6.50	.82	10.25	13.04	1.88	8.53	11.32	.16
All	4.47	6.90	1.17	3.03	5.46	-.28	8.35	10.37	1.14	6.68	8.70	-.53
U.S.[1]	5.30	6.83	4.90	3.75	5.39	3.33	6.90	9.52	5.97	5.24	7.88	4.29
Grapefruit												
Florida												
Seedless	5.02	6.50	4.05	3.72	5.25	2.71	3.89	5.78	2.64	2.52	4.48	1.24
Seeded	4.17	(3)	4.17	2.92	(3)	2.92	2.99	(3)	2.99	1.69	(3)	1.69
All	4.90	6.50	4.07	3.60	5.25	2.76	3.78	5.78	2.71	2.42	4.48	1.33
Texas	4.07	4.50	3.09	3.27	3.70	2.31	2.75	3.61	1.81	1.89	2.73	.98
California	4.58	7.60	.79	3.33	6.34	-.45	3.54	5.89	.15	2.21	4.56	-1.19
Arizona	3.92	6.11	1.00	2.72	4.91	-.20	2.50	5.00	.35	1.15	3.65	-1.01
U.S.	4.74	6.32	3.64	3.50	5.15	2.36	3.51	5.22	2.33	2.25	4.02	1.04
Lemons												
California	5.04	9.12	2.57	2.14	6.22	-.33	5.36	10.88	1.19	2.43	7.95	-1.75
Arizona	4.11	7.20	2.66	1.21	4.30	-.24	5.10	9.86	1.80	2.16	6.93	-1.14
U.S.	4.83	8.74	2.59	1.93	5.84	-.31	5.30	10.63	1.35	2.36	7.70	-1.59
Tangerines												
Florida	8.01	10.10	4.37	5.45	7.60	1.72	8.72	11.55	3.78	6.15	9.05	1.08
California	4.08	9.10	.62	.98	6.00	-2.48	7.93	11.60	1.20	5.43	9.10	-1.30
Arizona	6.04	10.10	.62	3.04	7.10	-2.38	6.74	10.30	1.41	3.69	7.25	-1.64
U.S.	6.45	9.85	2.27	3.65	7.14	-.62	8.15	11.39	2.52	5.53	8.81	-.17
Tangelos												
Florida	5.70	6.55	5.09	3.92	4.80	3.29	5.59	7.00	4.83	3.70	5.15	2.93
Limes												
Florida	11.10	17.50	2.24	6.58	12.70	-1.91	12.44	23.15	2.52	7.88	18.25	-1.73

[1] P.H.D.—Packinghouse-door. [1] Excludes Temples. [3] Fresh sales insignificant.

Source: *Agricultural Prices*, SRS.

Table 20—Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies, and movement, current season with comparisons

Item and season	Carryin	Pack		Imports and other supplies		Supply		Movement		Stocks[1]
		To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	
	1,000 gallons									
Orange[2]:										
1979/80	37,386	231,257	231,257	19,394	25,185	288,037	293,828	208,642	238,972	79,395
1980/81	57,281	174,537	174,537	68,475	75,081	300,293	306,899	211,100	240,647	89,193
1981/82	68,987	133,294		74,416		276,697		202,294		74,403
Grapefruit:										
1979/80	2,278	19,443	19,443	76	132	21,797	21,853	15,313	16,984	6,485
1980/81	4,876	20,763	20,763	308	309	25,947	25,948	15,526	17,548	10,414
1981/82	8,404	21,869		25		30,298		16,938		13,360
Tangerine:										
1979/80	593	2,142	2,142	—	—	2,735	2,735	1,594	1,851	1,141
1980/81	884	1,174	1,174	25	25	2,083	2,083	1,575	1,628	508
1981/82	455	924		19		1,398		949		449

[1] For the 1981/82 season, week ending October 9; 1980/81 October 10; 1979/80 October 11. These respective dates include data through the 45th week of each season. [2] For 1981/82, reported in 42.0 degree brix, previously reported in 43.4 and 45.0 degree brix. The conversion factor ratio from 43.4 degree to 42.0 degree is 1.03970 and the ratio from 45.0 degree to 43.4 degree is 1.0442029.

Source: Florida Citrus Processors Association.

Table 21—Chilled citrus products: Packs, stocks, supply, and movement, Florida, 1979/80 through 1981/82

Item and season[1]	Beginning stocks	Pack[2]	Total supply	Season movement	Ending stocks
			1,000 gallons		
Orange juice, s.s.:					
1979/80	15,721	234,768	250,489	233,775	16,714
1980/81[3]	16,714	209,863	226,577	210,370	16,207
1981/82	15,934	181,000	196,934	182,279	14,656
Grapefruit juice, s.s.:					
1979/80	1,440	28,674	30,114	27,364	2,750
1980/81[3]	2,750	25,483	28,233	25,881	2,353
1981/82	2,482	22,943	25,425	23,224	2,201
Grapefruit sections:					
1979/80	222	1,982	2,204	1,725	479
1980/81[3]	479	1,895	2,374	1,846	529
1981/82	504	1,579	2,083	1,476	607
Orange sections:					
1979/80	355	743	1,098	708	390
1980/81[3]	390	547	937	641	296
1981/82	289	493	782	559	224
Citrus salad:					
1979/80	779	2,201	2,980	2,478	502
1980/81[3]	502	1,585	2,087	1,825	262
1981/82	238	1,705	1,943	1,470	472

[1] Season beginning approximately October 1. [2] Packs of chilled juices include products of fresh fruit and frozen concentrate and excludes reprocessed single strength bulk. [3] The 1980/81 season incorporate 53 weeks.

Source: Florida Citrus Processors Association.

Table 22—Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, current season with comparisons

Item and season[1]	Beginning stocks	Pack	Supply	Movement	Ending stocks
			1,000 cases, 24 No. 2's		
Juices[2]					
Orange:[3]					
1979/80	2,618	13,869	16,487	13,974	2,513
1980/81[5]	2,513	12,914	15,427	12,685	2,741
1981/82	2,494	11,503	13,997	11,594	2,403
Grapefruit:[4]					
1979/80	3,030	16,604	19,634	16,221	3,413
1980/81[5]	3,412	14,135	17,547	13,993	3,555
1981/82	3,308	15,725	19,033	14,766	4,267
Blend:					
1979/80	254	1,314	1,568	1,161	407
1980/81[5]	406	984	1,390	1,027	363
1981/82	339	727	1,066	865	201
Tangerine:					
1979/80	4	17	21	16	5
1980/81[5]	6	9	15	11	4
1981/82	4	6	10	8	2
Canned fruits:					
Grapefruit sections:					
1979/80	114	1,966	2,080	1,792	288
1980/81[5]	288	1,671	1,959	1,522	437
1981/82	407	1,344	1,751	1,364	387
Orange sections:					
1979/80	4	18	22	17	5
1980/81[5]	5	19	24	16	8
1981/82	7	14	21	17	4
Citrus salad:					
1979/80	25	74	99	81	18
1980/81[5]	18	79	97	76	21
1981/82	20	69	89	73	16

[1] Season beginning approximately October 1. [2] Single strength. [3] Reconstituted canned orange juice, which has never been included in the Association's statistics, is now included with orange juice. [4] Reconstituted canned grapefruit juice, which previously has been reported separately, is now included with grapefruit juice. [5] The 1980/81 season incorporate 53 weeks.

Source: Florida Citrus Processors Association.

Table 23—Canned noncitrus fruit and juices: Canners' carryin, pack, supplies, and shipments, current season with comparisons

Item and season	Carryin	Pack	Total supply	Total season shipments
		1,000 equivalent cases, 24 No. 2-1/2's		
Apricot:[1, 2]				
1979/80	267	2,887	3,154	2,438
1980/81	716	2,994	3,710	2,641
1981/82	1,069	1,208	2,277	2,018
1982/83	259	1,489	1,748	
		1,000 equivalent cases, 24 No. 2's		
Pineapple:				
1979	12,553	26,877	39,430	27,545
1980	11,885	24,754	36,639	25,511
1981	11,128	24,148	35,276	24,505
1982	10,771			
Canned juice:				
Single strength pineapple:				
1979	4,280	12,185	16,465	12,247
1980	4,218	13,618	17,836	12,405
1981	5,440	13,394	18,934	13,373
1982	5,561			
		1,000 equivalent cases, 6 No. 10's		
Concentrated pineapple:				
1979	500	1,543	2,043	1,604
1980	439	1,273	1,712	1,155
1981	556	1,091	1,647	1,109
1982	538			

[1] Season beginning June 1. [2] California only.

Sources: California League of Food Processors and Pineapple Growers Association of Hawaii.

Table 24—U.S. wholesale price indexes of selected dried and frozen items, by months, 1979-82

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
						1967=100						
DRIED FRUIT:												
Prunes												
1979	263.4	264.5	264.5	264.5	264.5	264.5	264.5	264.5	264.5	264.5	273.0	272.0
1980	266.2	263.7	263.7	261.2	261.2	261.2	261.2	261.2	269.2	275.7	275.7	275.7
1981	273.7	270.7	270.7	272.7	270.7	270.7	270.7	270.7	270.7	270.7	270.7	278.7
1982	278.7	281.7	281.7	281.7	281.7	281.7	281.7	281.7	284.2			
Raisins												
1979	646.3	635.2	635.2	635.2	635.2	635.2	635.2	624.0	548.7	548.7	443.5	443.5
1980	443.5	443.5	443.5	443.5	443.5	443.5	445.7	445.7	445.7	450.2	454.6	459.1
1981	459.1	443.5	443.5	443.5	448.0	448.0	459.1	459.1	459.1	459.1	459.1	462.7
1982	462.7	452.4	452.4	452.4	448.0	448.0	448.0	448.0	445.0			
FROZEN JUICE:												
Orange, conc.												
1979	260.2	260.2	260.2	260.2	260.2	260.2	260.2	260.2	260.2	260.2	260.2	260.2
1980	260.2	260.2	260.2	254.3	254.3	249.2	249.2	249.2	249.2	249.2	236.5	236.5
1981	231.8	280.2	312.2	338.1	338.1	338.1	338.1	338.1	335.0	335.0	326.3	313.8
1982	312.9	328.8	336.4	328.2	316.5	309.5	309.4	307.1	307.8			

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 25—U.S. monthly average price indexes for fruits

Item	1981					1982								
	Annual	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
							(1967=100)							
Wholesale price index:														
Fresh fruit	226.7	237.9	237.9	250.8	264.4	241.6	250.8	230.0	243.2	244.7	221.1	215.4	247.6	237.9
Citrus fruit	196.0	250.9	192.5	169.8	183.7	168.2	190.9	157.1	173.0	187.6	195.5	210.5	222.0	269.6
Other fruit	239.8	230.1	257.0	286.3	299.6	273.7	276.5	261.9	273.7	269.1	231.2	216.1	257.5	221.5
Dried fruit	405.9	408.7	408.7	408.7	414.7	414.7	410.0	410.0	410.0	407.2	407.2	407.2	407.2	406.9
Canned fruit and juice	273.8	278.8	281.6	275.5	280.1	282.2	286.5	285.1	284.3	284.1	287.1	285.1	283.8	281.2
Canned fruit	242.5	244.5	284.1	247.0	252.5	253.7	255.2	253.2	252.1	250.6	255.3	252.9	250.5	245.4
Canned fruit juice	306.8	332.9	334.5	320.6	323.7	323.7	336.0	486.4	335.3	337.1	337.3	335.9	336.4	337.7
Frozen fruit and juice	302.8	318.0	317.9	313.0	304.9	304.4	313.7	318.0	313.2	306.4	302.3	302.7	301.3	301.9
Consumer price index:														
Fresh fruit	278.1	306.4	291.4	276.1	269.6	276.7	291.2	297.8	306.7	318.8	340.8	332.4	336.1	329.0
							(1977=100)							
Index of fruit prices received by growers[1]	129	127	130	150	146	140	148	144	145	157	166	192	188	295

[1] Index for fresh and processed.

Sources: Bureau of Labor Statistics, U.S. Department of Labor, and *Agricultural Prices*, SRS.

Table 26—U.S. monthly average fruit prices received by growers

Commodity and unit	1981			1982									
	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.
Apples for fresh use (cts./lb.)	16.8	17.0	17.1	15.6	17.5	17.7	16.0	16.0	17.6	16.7	13.3	17.5	15.1
Pears for fresh use ($/ton)	221.00	290.00	281.00	260.00	304.00	328.00	300.00	335.00	—	—	243.00	197.00	232.00
Peaches for fresh use (cts./lb.)	—	—	—	—	—	—	—	—	16.3	21.7	23.4	22.3	—
Strawberries for fresh use (cts./lb.)	70.4	107.0	—	67.5	64.1	56.8	57.3	50.1	47.9	52.6	66.0	50.6	64.3
Oranges: ($/box)[1]													
Fresh use	5.31	5.42	6.38	6.60	7.34	7.05	7.53	9.92	10.76	12.11	12.62	20.02	13.57
Processing	.83	1.58	3.72	4.38	4.48	3.59	4.09	5.20	5.33	.16	.16	.16	.80
All	2.99	4.13	4.64	4.65	4.96	4.70	5.11	6.13	6.89	9.47	8.54	17.47	9.24
Grapefruit: ($/box)[1]													
Fresh use	5.08	3.84	3.71	3.46	4.21	3.42	3.83	4.03	3.97	5.99	4.35	4.56	4.07
Processing	.53	1.42	1.50	1.27	1.31	1.18	.74	.08	−.48	−1.20	−1.32	−1.10	−.83
All	4.26	2.78	2.58	2.13	2.06	1.75	2.09	2.20	1.42	3.27	2.22	2.84	2.65
Lemons: ($/box)[1]													
Fresh use	10.99	3.62	4.18	3.29	2.13	3.78	7.10	9.74	9.54	11.64	12.50	12.66	10.14
Processing	−.92	−1.39	−1.43	−1.59	−1.86	−1.86	−1.86	−1.86	−1.86	−1.86	−3.14	−3.14	−3.14
All	4.10	.48	.66	.37	.72	.70	2.19	3.23	4.14	6.06	5.56	5.48	2.70
Tangerines: ($/box)[1]													
Fresh use	12.35	11.83	7.74	7.91	6.33	6.59	8.34	9.45	—	—	—	14.30	15.30
Processing	1.00	.21	.51	−.24	−1.36	−1.51	−1.62	−1.69	—	—	—	−.70	−1.20
All	9.48	8.11	4.98	4.59	3.60	3.11	4.16	5.23	—	—	—	11.49	10.17

[1] Equivalent on-tree returns.

Source: *Agricultural Prices*, SRS.

Table 27—Fresh Fruit: Retail prices, marketing margins, and grower and packer return per pound, sold in Baltimore, seasonal average, 1979/80-1981/82

Commodity and season	Retail price[1] (cents)	Marketing margins		Grower and packer returns[2] (f.o.b. shipping point prices)[3]	
		Cents	Percentage of retail price	Cents	Percentage of retail price
Apples, Eastern Delicious:					
1979/80	56.0	31.8	57	24.2	43
1980/81	53.9	32.8	61	21.1	39
1981/82	42.3	14.6	34	27.7	66
Apples, Washington Delicious:					
1979/80	60.8	30.3	50	30.5	50
1980/81	54.4	31.4	58	23.0	42
1980/81	63.3	29.8	47	33.5	53
Grapefruit, Florida:					
1979/80	22.7	14.1	62	8.6	38
1980/81	29.6	19.1	65	10.5	35
1981/82	25.1	15.7	63	9.4	37
Lemons, Western:					
1979/80	82.0	56.7	69	25.3	31
1980/81	68.7	46.2	67	22.5	33
1981/82	81.4	56.3	69	25.1	31
Oranges, California Navel:					
1979/80	39.1	25.7	66	13.4	34
1980/81	40.0	26.1	65	13.9	35
1981/82	43.2	24.8	57	18.4	43
Oranges, California Valencia:					
1979	50.6	32.5	64	18.1	36
1980	41.0	27.8	68	13.2	32
1981	45.9	30.8	67	15.1	33
Oranges, Florida:					
1979/80	24.3	14.6	60	9.7	40
1980/81	30.1	17.8	59	12.3	41
1981/82	30.1	17.7	59	12.4	41

[1] Retail prices, Maryland State Department of Agriculture. [2] For quantity of product equivalent to retail unit sold to consumer. Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. [3] Production area and season: Apples, Eastern Delicious-New York State (Oct.-May); Apples, Delicious-Washington State (Nov.-May); Grapefruit-Florida (Nov.-Apr.); Lemons-California (Aug.-July); Oranges, California Navel (Dec.-May); Oranges, California Valencia (May-Nov.); Oranges-Florida (Nov.-May).

Table 28—U.S. exports of selected dried fruits and tree nuts by destination, 1979/80-1981/82 seasons

Item and season[1]	Canada	Europe				Other	Total
		United Kingdom	Other EC[2]	Other	Total		
			Metric tons				
Prunes:							
1979/80	3,280	2,215	19,391	8,871	30,477	8,872	42,629
1980/81	3,257	1,539	28,454	11,015	41,008	12,152	56,417
1981/82	3,257	3,507	24,579	10,053	38,139	16,644	58,040
Raisins:							
1979/80	8,042	7,866	17,008	9,048	33,922	25,965	67,929
1980/81	9,278	3,975	12,221	9,488	25,684	29,915	64,877
1981/82	7,215	2,118	8,565	9,289	19,972	28,498	55,685
Shelled almonds:							
1979/80	1,814	4,822	42,833	9,296	56,951	19,384	78,149
1980/81	2,203	2,999	38,215	8,047	49,261	20,342	71,806
1981/82	2,675	4,775	34,816	7,678	47,269	22,840	72,784

[1] Season beginning September 1 for prunes and raisins and July 1 for almonds. [2] Belgium-Luxembourg, France, West Germany, Italy, Netherlands, Denmark, Ireland, and Greece.

Source: Foreign Agricultural Service.

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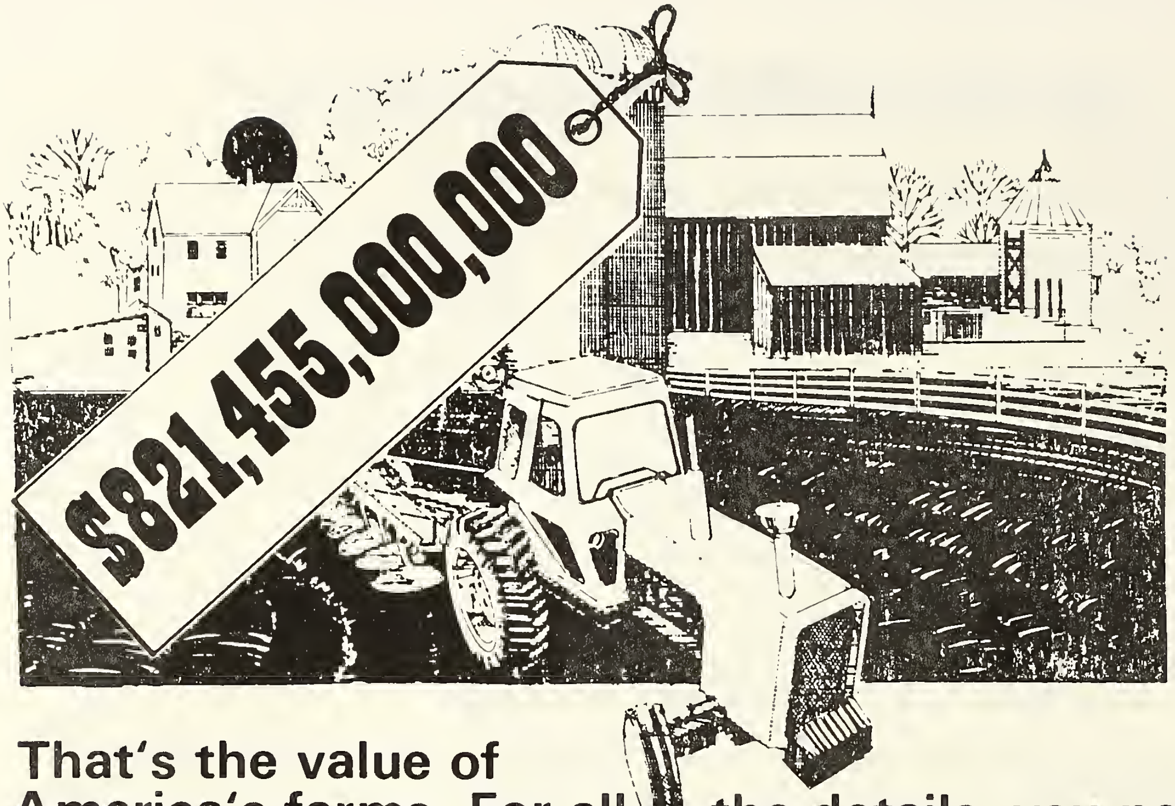

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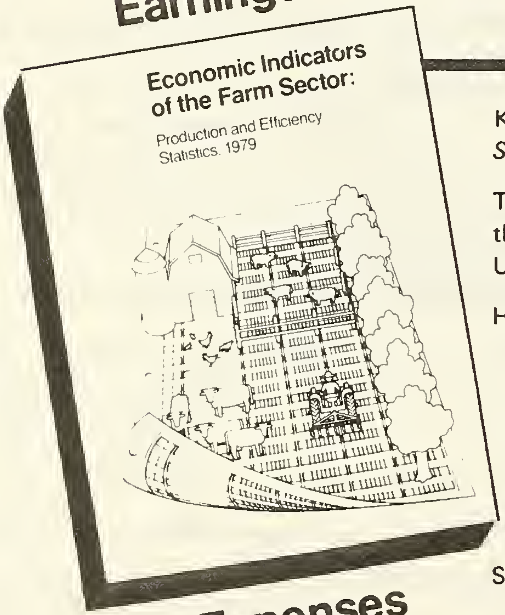

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